

**Kansas Helpers  
Time Entry  
Training for  
Employers &  
Employees**



Helping create a positive, long-lasting  
impact on people's lives.

# Agenda



**Acumen Fiscal Agent**  
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	<b>Overview + Mobile App Download &amp; Login</b>
	<b>Employee – Mobile App Entry &amp; EVV/Client Attestation</b>
	<b>Employer – Mobile App – Manage Entries</b>
	<b>Employee – Web Portal Historical Entry &amp; Edit Entries</b>
	<b>Employer – Web Portal – Manage Entries</b>
	<b>Troubleshooting</b>
	<b>Phone EVV (IVR) – Real time &amp; Historical Entries</b>

# Quick Resources

- View short step-by-step resource documents on the [Kansas Self Direction – Training Materials](#) page providing instructions for the punch entry and approval process.
- **Employee Specific Resources:**
  - ✓ Helpers – Employee Mobile App Entries
  - ✓ Employee Web Portal Entries with EVV Location
- **Employer Specific Resources:**
  - ✓ Employer Manage Entries
  - ✓ Employer Manage Budgets (Service Plan in Units)
- **Shared Resources:**
  - ✓ Download the DCI Mobile EVV App & Log In
  - ✓ Logging into the Web Portal or the Mobile App
  - ✓ Phone EVV IVR Real Time & Historical Entries
  - ✓ Business Rule Alerts – Quick Reference



# What is EVV?

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- The 21st Century Cures Act, signed into law December 13<sup>th</sup>, 2016, by President Obama, requires state agencies to use a system of **electronic visit verification (EVV)** for all Medicaid personal care services (PCS) and home health care services (HHCS) that require an in-home visit by a provider.
- EVV uses electronic devices to verify a provider's visit
- The following data is collected for each visit:
  - ✓ The date of the service
  - ✓ The location of the service delivery
  - ✓ The time the service begins and ends
  - ✓ The individual receiving the service
  - ✓ The individual providing the service
  - ✓ The type of service performed





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# Why DCI & EVV (Electronic Visit Verification)?

- DCI increases compliance with the 21<sup>st</sup> Century Cures Act by capturing real-time punch entries at Clock In/Out at the Start/End of the shift
- Greater accuracy in service tracking, reporting, and billing for in-home care workers.
- Reduction of manual work needed with paper processes
- Faster corrections of pay issues ensuring timely payment



# Important Update!

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- AuthentiCare will no longer be utilized after September 30<sup>th</sup>, 2024. Please begin using DCI October 1<sup>st</sup>, 2024, for all time entry.
  - ✓ Email / Mailing sent by Helpers on September 10<sup>th</sup>, 2024, announced that beginning October 1<sup>st</sup>, 2024, the organization will use a new electronic timekeeping system, Direct Care Innovations (DCI), offered through our management company, Acumen.
    - DCI works as both the Electronic Visit Verification (EVV) and time entry system
- Employees are responsible for all time entries including new and edited entries
  - ✓ Notices about missed punches will no longer be provided
  - ✓ Time adjustments via voicemail or email will no longer be accepted
  - ❖ Entries must be approved within 5 days of the date of service
    - After 5 days the approval will be prohibited as it will violate the timely filing business rule
- Employers are responsible for reviewing and approving all time
  - ❖ Entries must be approved within 5 days of the date of service
    - After 5 days the approval will be prohibited as it will violate the timely filing business rule

# Ways to Enter Time

## Only use one per shift (each clock in/out)

### Mobile App



- **\*Preferred Method**
- Real Time Entry – EVV compliant
- Quick & Easy
- [Mobile App Guide](#)

OR

### Phone EVV



- Landline
- Real Time Entry – EVV compliant
- Historical Entry – Non-EVV compliant
- Option when access to a mobile device or computer is limited

OR

### Web Portal



- Only used for service interruptions
- Time Management
- [Historical Entry](#) & Corrections – Non-EVV compliant
- Manual Time Approval
- [Profile Settings](#)
- **\*Includes Mobile Web Portal** – Mobile-friendly web portal version accessed via smartphone or tablet

# DCI Requirements

## Devices & Operating Systems (OS)

### Apple

- OS: iOS version 15.0 or later
  - Devices:
    - ✓ iPhone 6s or 6s Plus or later device
    - ✓ iPhone SE
    - ✓ iPod touch (7th generation)

### Android

- OS: Android version 8.0 or later
  - Devices:
    - ✓ 4.6" screen or larger
    - ✓ Due to the wide range of Android devices, we are unable to provide a device list.



## Web Browsers

- ✓ Google Chrome (DCI Preferred)
- ✓ Firefox
- ✓ Edge
- ✓ Safari

# DCI Mobile App

**\*Preferred Time Entry Method**

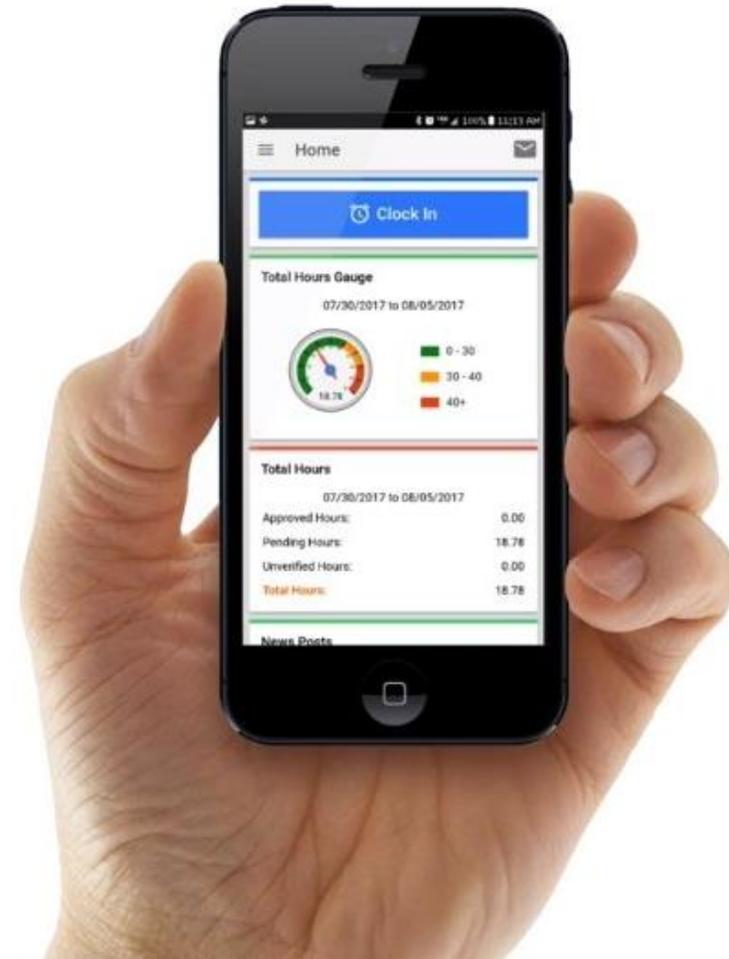


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# Mobile App Basics

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- The DCI Mobile App is used for real-time entries
- Preferred, EVV-compliant method
- Can be downloaded on a mobile device or tablet
- Use for clocking in & out
- Quick & easy
- View all entries including status & details



# Download DCI Mobile EVV

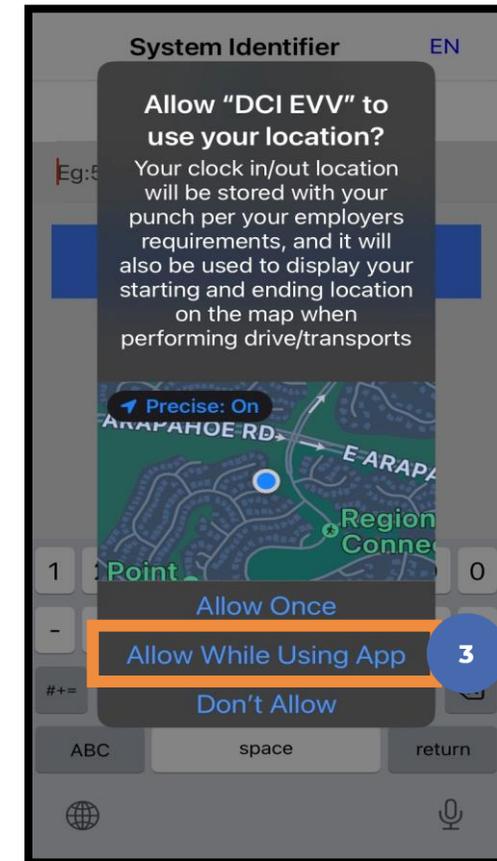
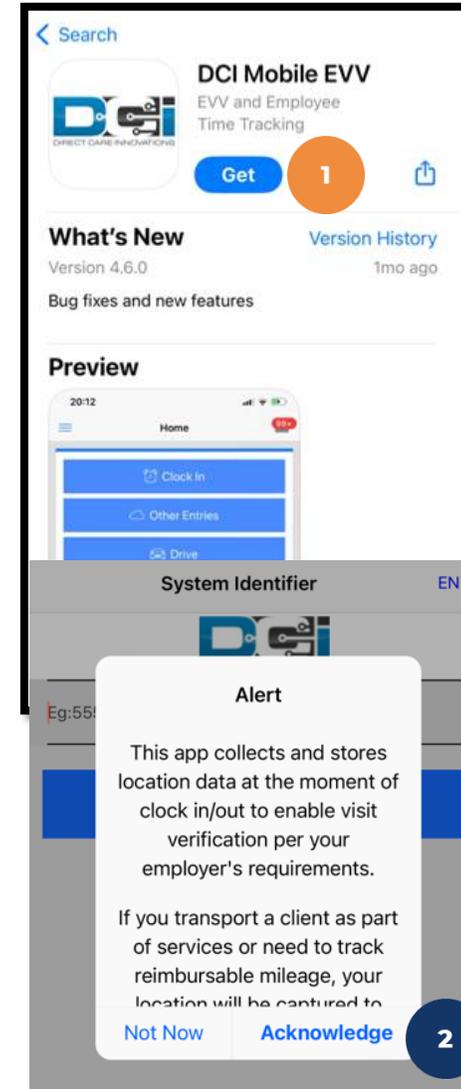
1. [Download](#) the **DCI Mobile EVV** App



2. Select Acknowledge on the Alert
  - The alert states the app collects and stores location data at clock in and clock out, if you transport a client as part of services and/or need to track reimbursable mileage
3. Select **Allow While Using App** only when accessing the app for the first time or after a new download to give the app access to the device's location
  - Location is only captured at clock in & out

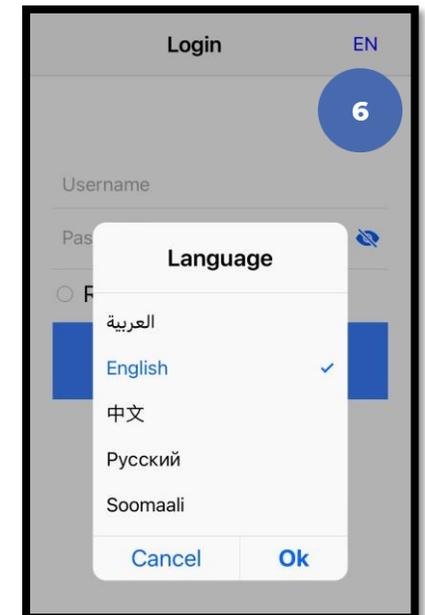
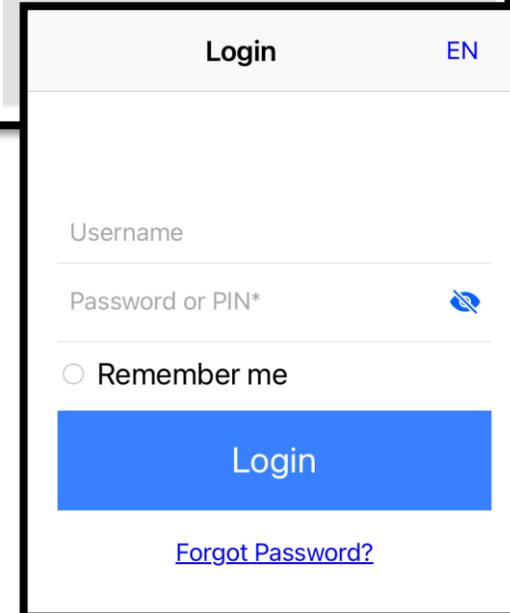
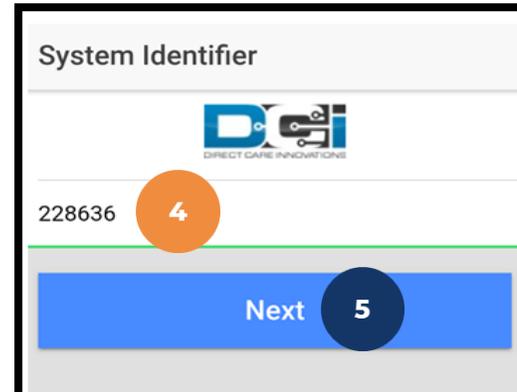
## \*Please note!

- There is more than one DCI app available. Please be sure to select the one labeled **DCI Mobile EVV**.
- Users may need to set app permissions. Media access is not necessary.



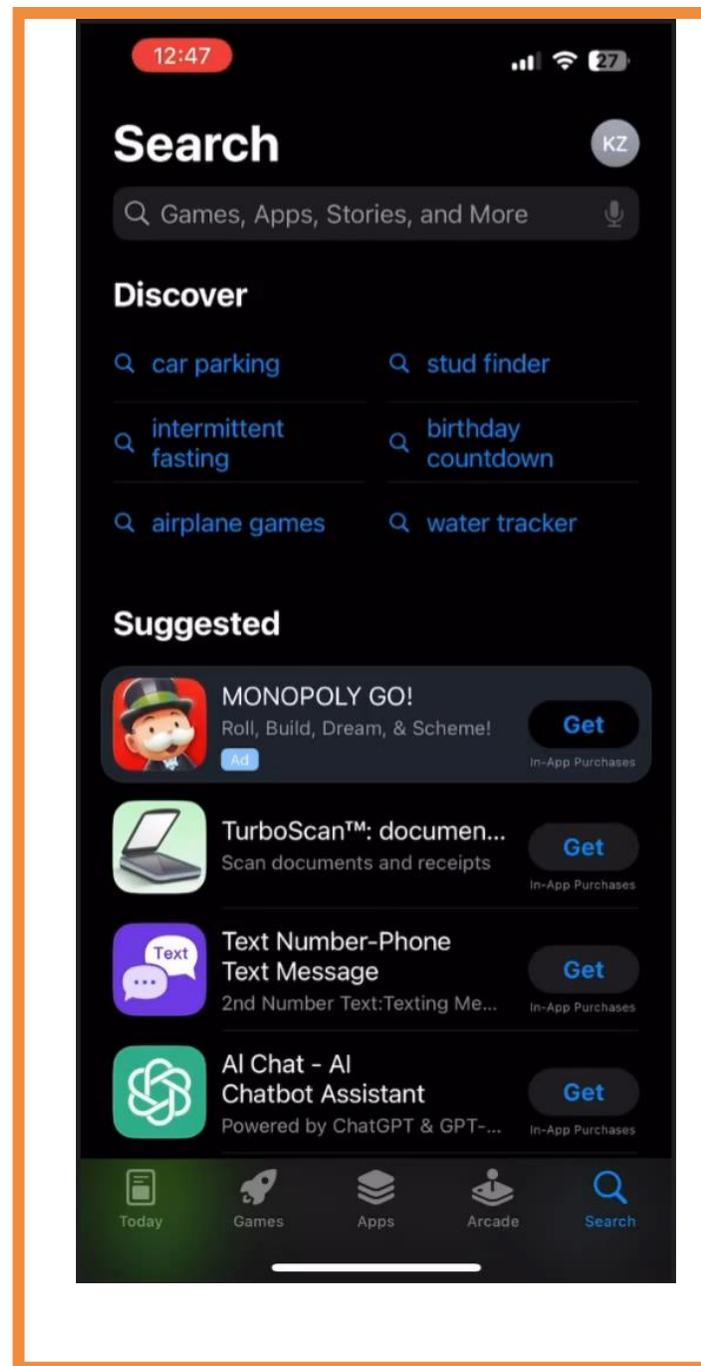
# Download DCI Mobile EVV

4. Enter System Identifier: **228636**
5. Click the blue **Next** button to access the login screen
6. Click the language button (**EN**) in the top right corner to change the language in the app
  - Preferred language is only available for employees
  - Choose from seven languages!



# Mobile App Video

## Download the DCI Mobile EVV App



# Log into the DCI Mobile App



## 1. Enter employee credentials

- ✓ Helpers will provide a **username** and **password** via email or letter by September 24<sup>th</sup>
- ✓ Optionally, select "Remember Me" to save the username

**\*Please note:** Do not use on a shared device

## 2. Click the blue **Login** button to access the mobile app

- ✓ The **Forgot Password** link is available if necessary but requires a valid email address to be on file

**\*Please note:** Contact Acumen customer service or the Helpers client service team with any login issues

A screenshot of the mobile app's login screen. At the top, the word "Login" is displayed in a grey header. Below this, there are two input fields: "Username" and "Password or PIN\*". The "Username" field has an orange circle with the number "1" next to it. The "Password or PIN\*" field has a blue eye icon to its right. Below the input fields is a checkbox labeled "Remember me". At the bottom of the form is a large blue button with the word "Login" and a black circle with the number "2" next to it. Below the button is a blue link that says "Forgot Password?".

# Employee Mobile App

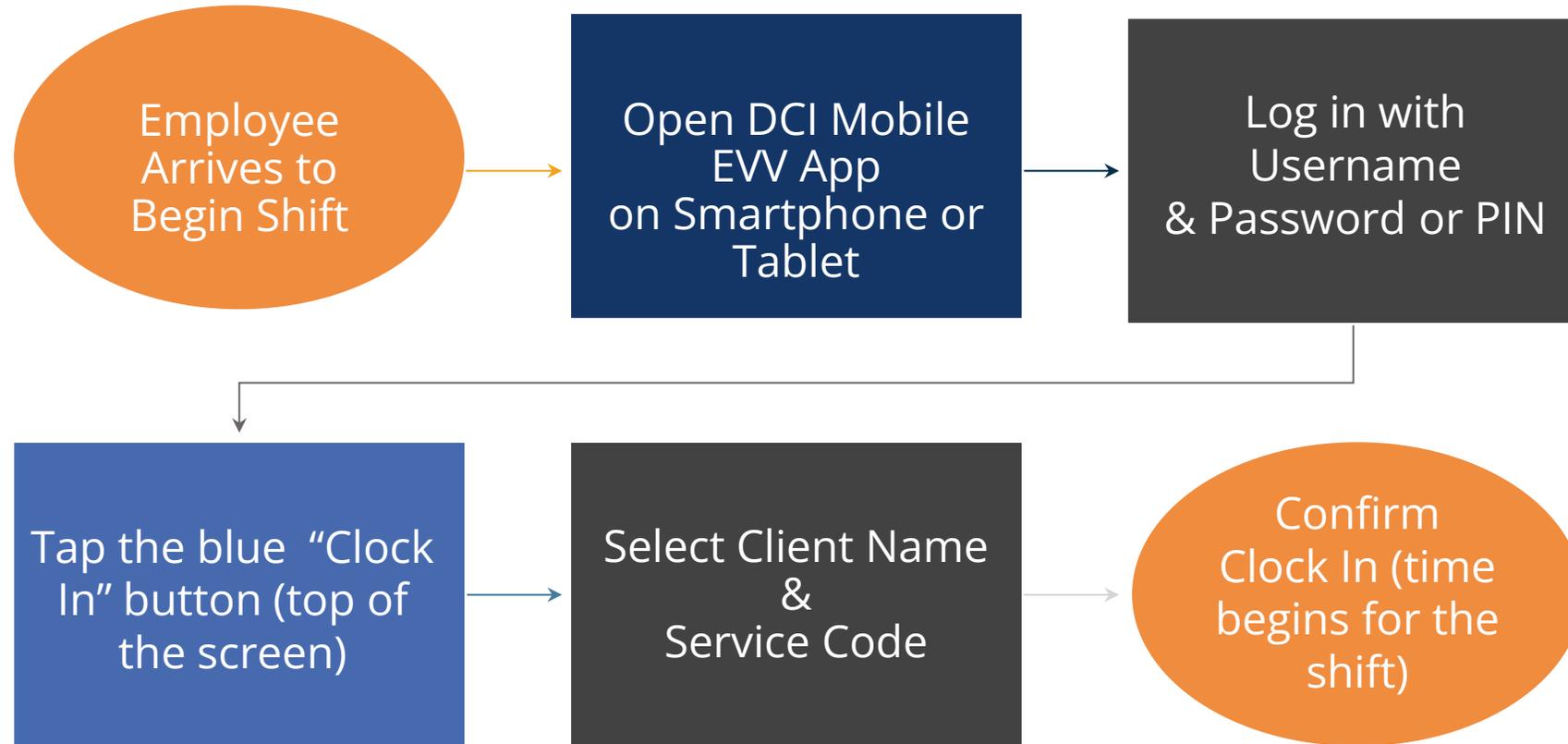
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## Employee Clock In/Out Process



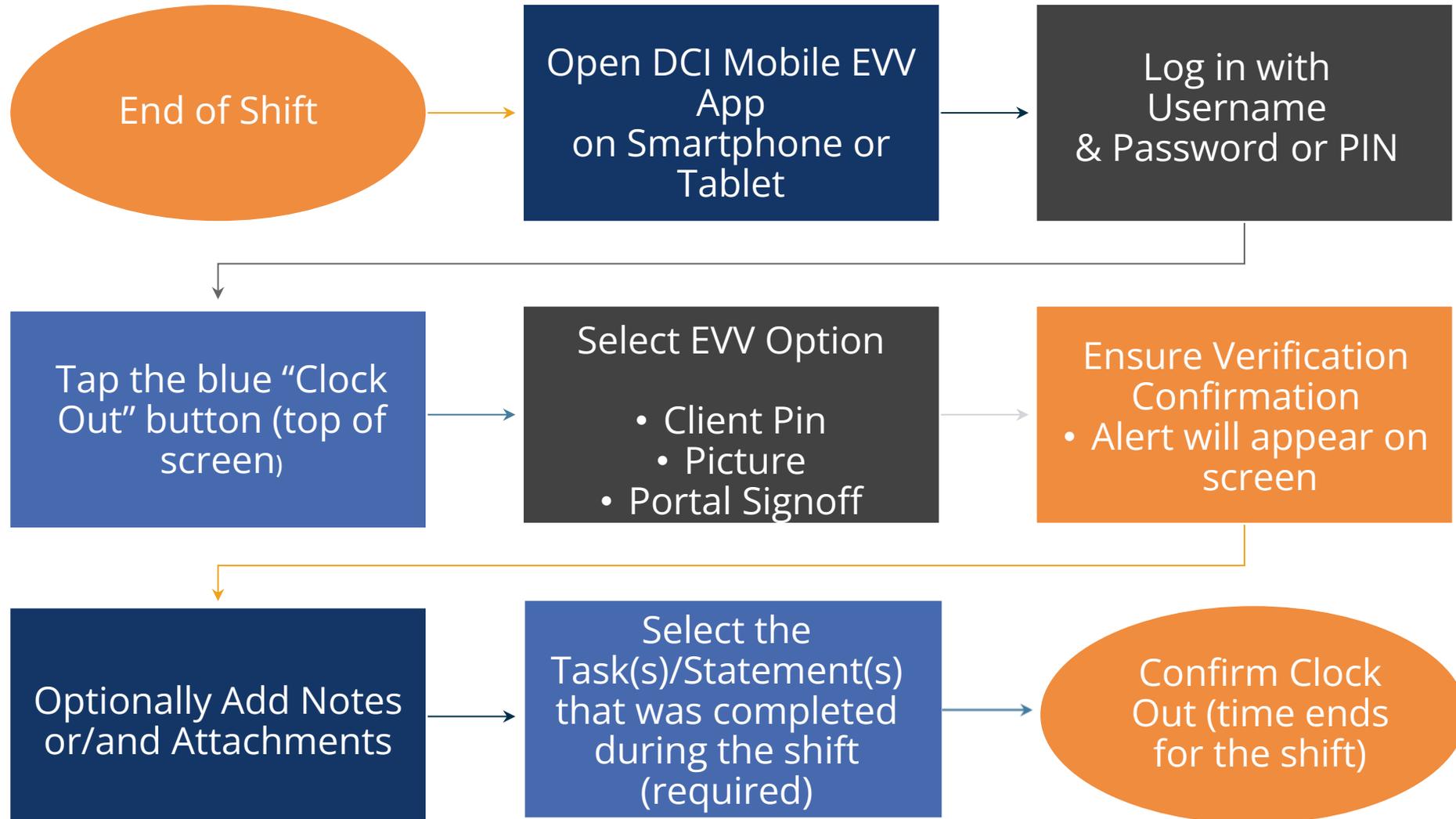
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# Overview Mobile App Clock In



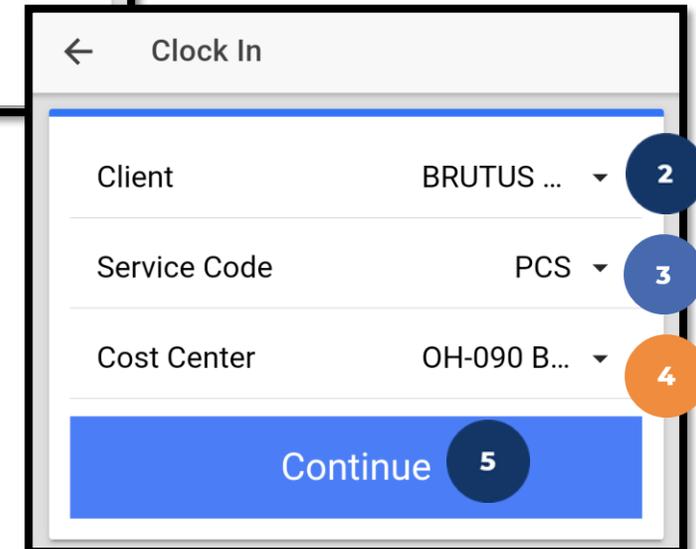
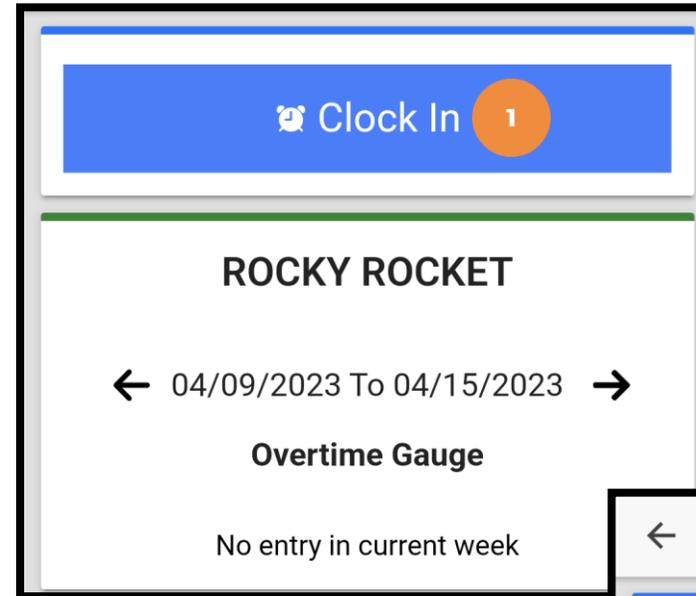


# Overview Mobile App Clock Out



# Clock In on Mobile App

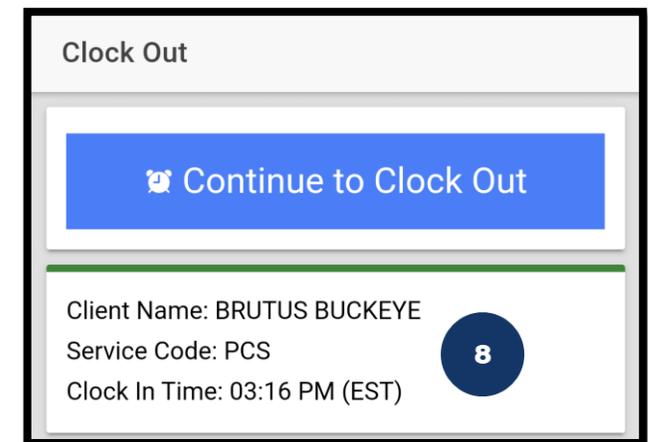
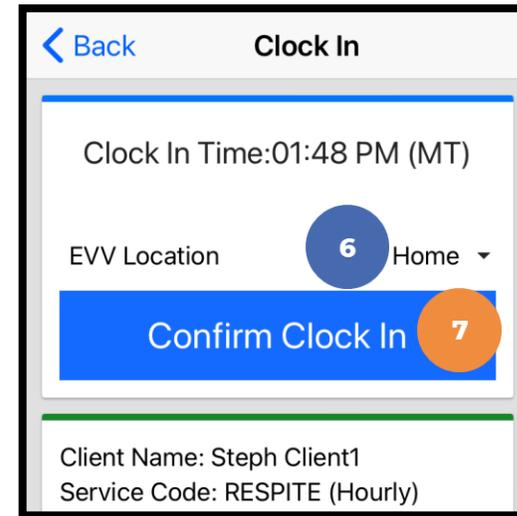
1. Click the blue **Clock In** Button
2. Select the Client's Name
  - Auto-fills for a single client
3. Select the Service Code
  - Auto-fills for a single service
4. Cost Center is always auto-filled
5. Click the blue **Continue** button





# Clock In on Mobile App (cont.)

6. Select the EVV Location
    - Defaults to the primary location
  7. Select Confirm Clock In
    - \* *This will start the time for the shift*
  8. Clock In Details Summary
    - Clock in is successful when the blue **Continue to Clock Out** button displays
    - Clock in details display in summary form
- \*Please note:** Users do not need to stay logged into the mobile app during their shift and cannot take any other action until clocked out.



# Mobile App – EVV Options (Client/Employer Attestation)



- There are three EVV (client attestation) options that allow the client to verify that they received service
  - ✓ Choose only one option per shift (each clock out)
- Client attestation is an extra layer of protection against potential fraud because the client/employer is “signing off” on the punch in real time

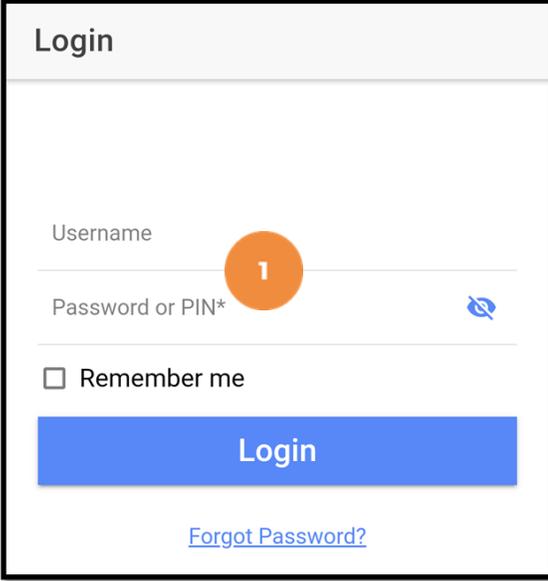
**\*Please note:** The employer must still *review* AND *approve* punch entries in their Pending Entries tab each pay period.

A screenshot of a mobile application interface titled "Clock Out Verification". At the top left is a blue back arrow and the word "Back". At the top right is the title "Clock Out Verification". Below the title is a white box with a blue border containing the heading "Clock Out Verification Required". Underneath is a label "EVV Location" followed by a dropdown menu showing "Home". Three large blue buttons are stacked vertically: "Client PIN" with a lock icon, "Picture" with a camera icon, and "Portal Signoff" with a person icon. At the bottom of the screen, a white box with a green border contains the text: "Client Name: Steph Client", "Service Code: PCS", and "Clock In Time: 07:12 AM (MT)".

# Clock Out - EVV Option #1

## Client PIN

1. At the end of the shift, log in to the mobile app.
2. Click the blue **Continue to Clock Out** button
3. Select **Confirm** to proceed with clocking out



Login

Username

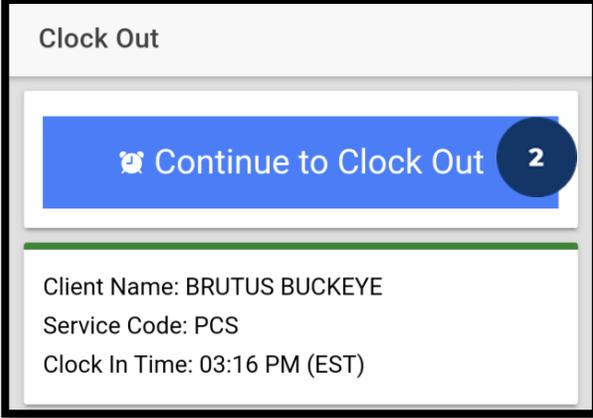
Password or PIN\*

Remember me

Login

[Forgot Password?](#)

1

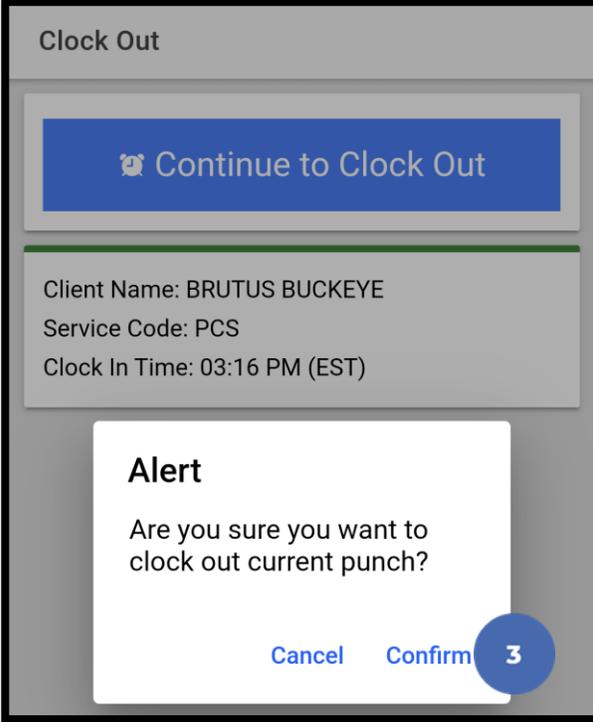


Clock Out

[Continue to Clock Out](#)

Client Name: BRUTUS BUCKEYE  
Service Code: PCS  
Clock In Time: 03:16 PM (EST)

2



Clock Out

[Continue to Clock Out](#)

Client Name: BRUTUS BUCKEYE  
Service Code: PCS  
Clock In Time: 03:16 PM (EST)

**Alert**

Are you sure you want to clock out current punch?

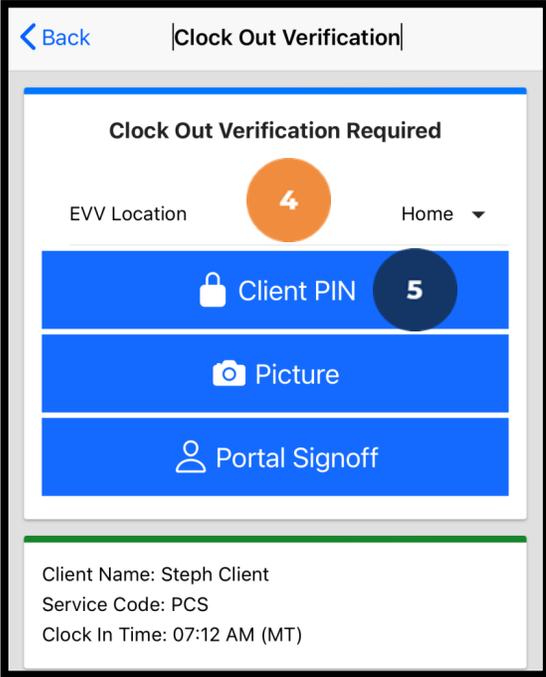
Cancel Confirm

3

# Clock Out - EVV Option #1 (cont.)

## Client PIN

4. Select the EVV Location
5. Select the clock out verification type:
  - ✓ Client PIN
6. Hand the mobile device to the client or employer, who enters the Client PIN (will be issued on the email or letter by September 24th).
7. The client or employer clicks the blue **Submit** button when ready
8. The client or employer clicks **Confirm** to validate the PIN and hands the mobile device back to the employee



Back | Clock Out Verification

Clock Out Verification Required

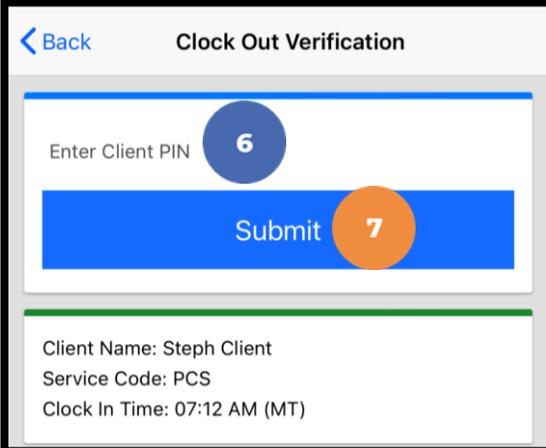
EVV Location **4** Home ▾

Client PIN **5**

Picture

Portal Signoff

Client Name: Steph Client  
Service Code: PCS  
Clock In Time: 07:12 AM (MT)

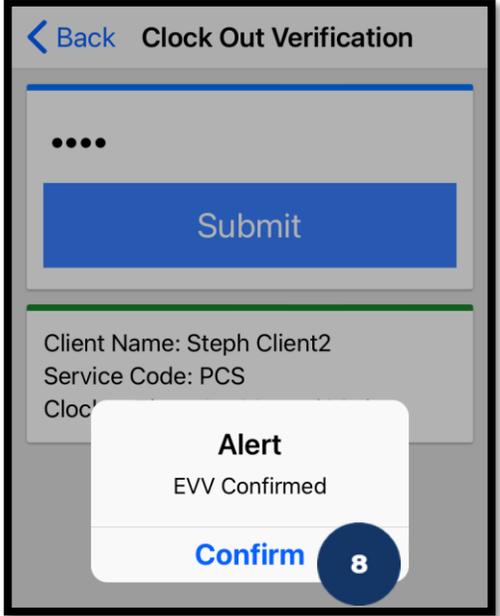


Back | Clock Out Verification

Enter Client PIN **6**

Submit **7**

Client Name: Steph Client  
Service Code: PCS  
Clock In Time: 07:12 AM (MT)



Back | Clock Out Verification

Submit

Client Name: Steph Client2  
Service Code: PCS  
Clock

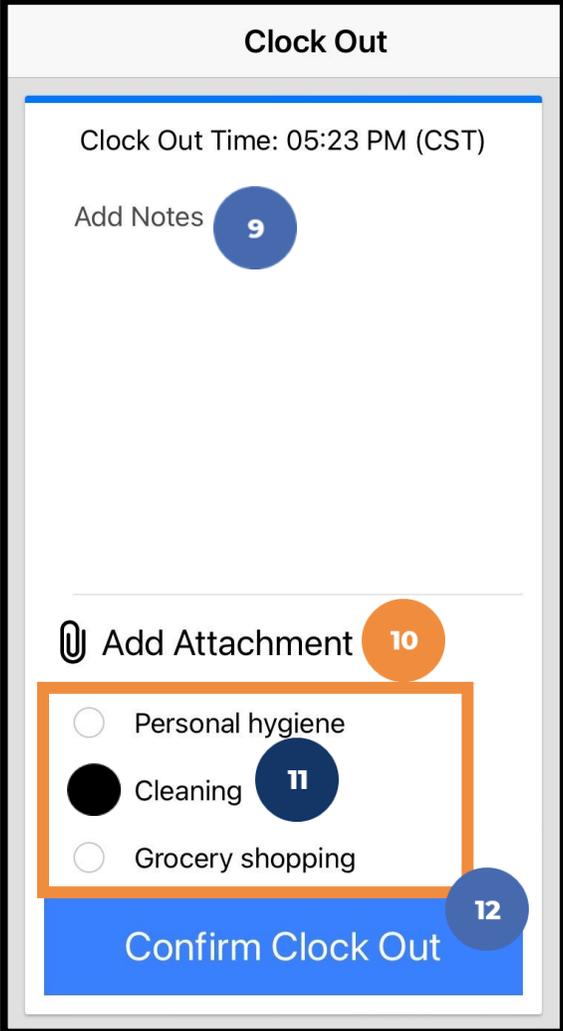
**Alert**  
EVV Confirmed

Confirm **8**

# Clock Out – EVV Option #1 (cont.)

The employee:

9. Enters any notes for the punch (optional)
10. Adds an attachment for the punch (optional)
11. Selects the task(s)/statement(s) that was completed during the shift
  - ✓ Tasks/statements are a quick way to document the duties completed with/for the participant
  - ✓ The entry cannot be saved without a selection
12. Clicks the blue **Confirm Clock Out** button when ready
  - ✓ *This will stop the time for the shift*
13. Punch Confirmation
  - Punch details are shown
  - Click the blue **Home** button when ready



**Clock Out**

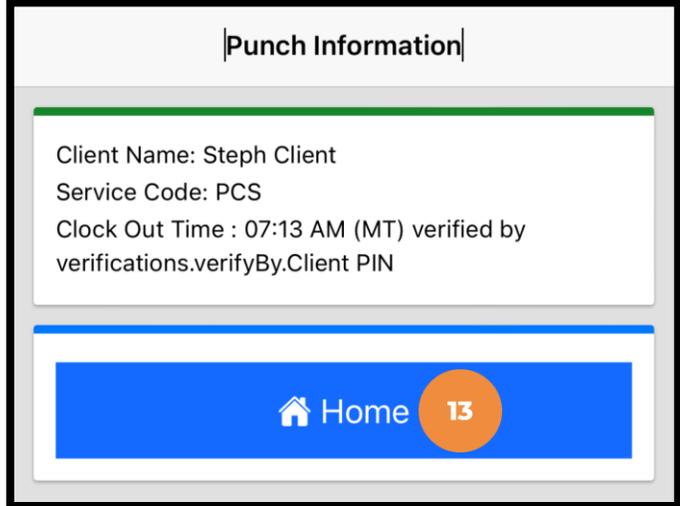
Clock Out Time: 05:23 PM (CST)

Add Notes 9

Add Attachment 10

- Personal hygiene
- Cleaning 11
- Grocery shopping

Confirm Clock Out 12



**Punch Information**

Client Name: Steph Client  
Service Code: PCS  
Clock Out Time : 07:13 AM (MT) verified by verifications.verifyBy.Client PIN

Home 13

**Congratulations!**  
The shift is complete.

# Mobile App Video

## Clock in and Out Using Client PIN Option

Login

Username\*

Password or PIN\* 

Remember me

Login

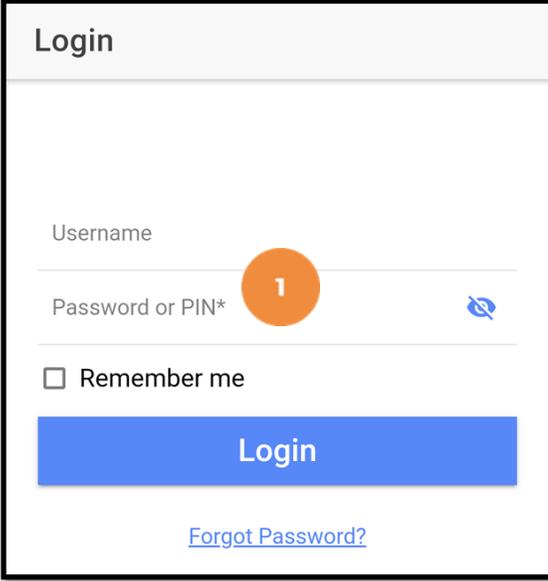
[Forgot Password?](#)

# Clock Out - EVV Option #2

## Picture

1. At the end of the shift, log in to the mobile app.
2. Click the blue **Continue to Clock Out** button
3. Select **Confirm** to proceed with clocking out

**\*Please note:** The employer must complete facial recognition setup prior to using the Picture EVV option.



Login

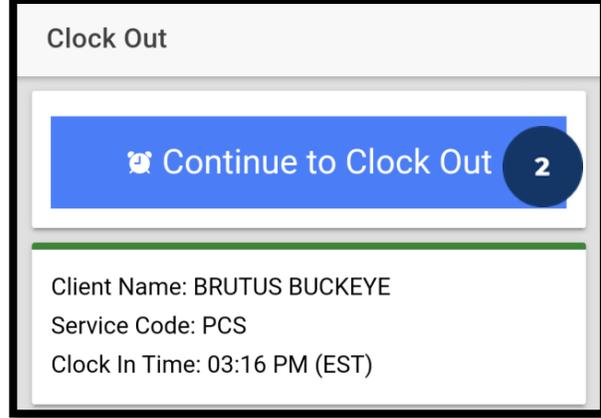
Username

Password or PIN\* 1

Remember me

Login

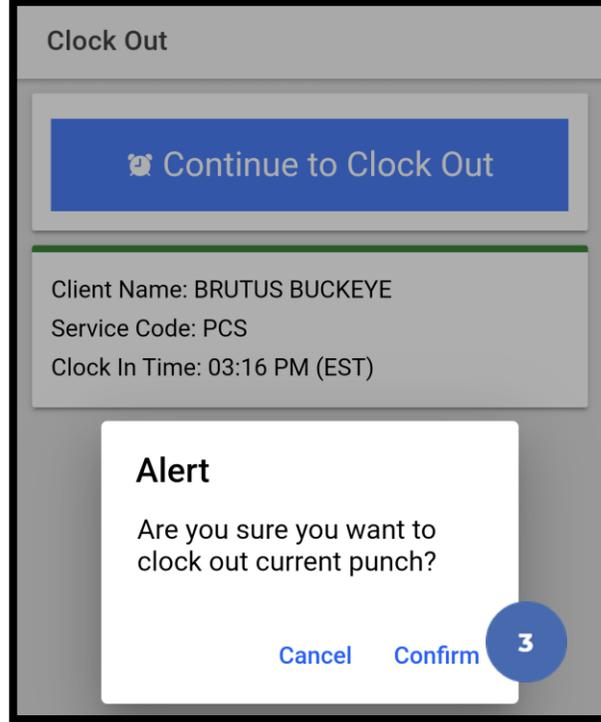
[Forgot Password?](#)



Clock Out

Continue to Clock Out 2

Client Name: BRUTUS BUCKEYE  
Service Code: PCS  
Clock In Time: 03:16 PM (EST)



Clock Out

Continue to Clock Out

Client Name: BRUTUS BUCKEYE  
Service Code: PCS  
Clock In Time: 03:16 PM (EST)

**Alert**

Are you sure you want to clock out current punch?

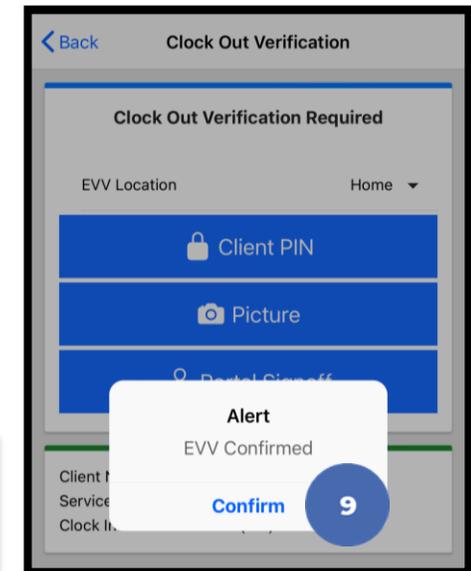
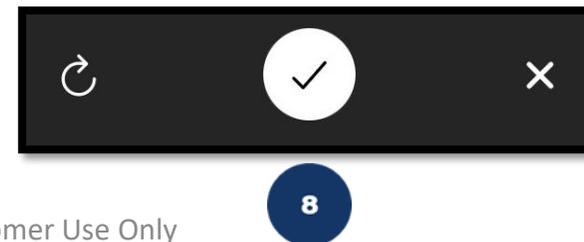
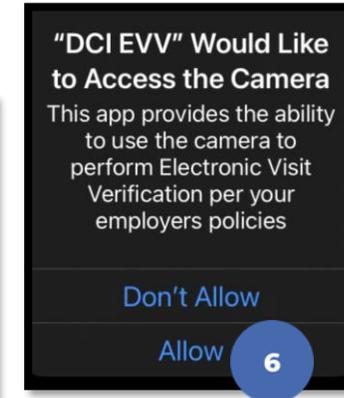
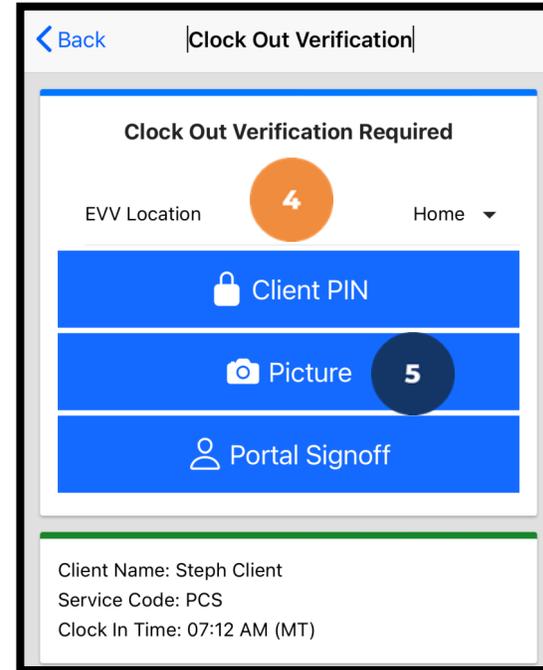
Cancel Confirm 3

# Clock Out - EVV Option #2 (cont.)

## Picture

4. Select the EVV Location
5. Select the clock out verification type:
  - ✓ Picture
6. A pop-up stating “DCI EVV” Would Like to Access the Camera appears. Select **Allow**.
7. Click the **camera** icon to take a picture of the client
8. Click the **checkmark** to accept the picture, the X to cancel, or the circular arrow to retake the picture.
9. Click **Confirm** in the alert pop-up box to confirm the punch

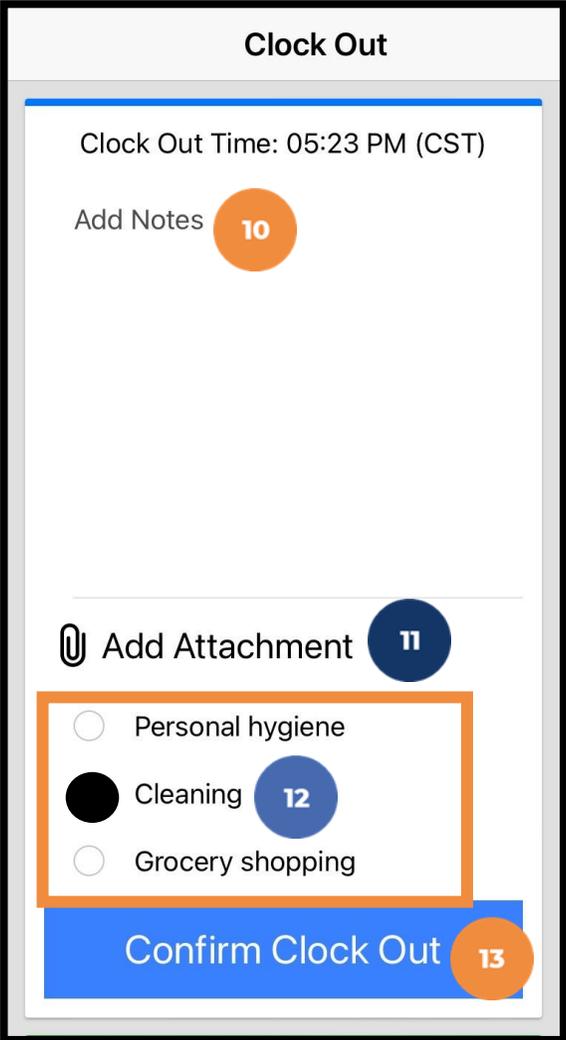
**\*Please note:** Client photos taken by the employee for electronic visit verification (EVV) are never stored on the employee’s cell phone when using the DCI Mobile App



# Clock Out – EVV Option #2 (cont.)

The employee:

10. Enters any notes for the punch (optional)
11. Adds an attachment for the punch (optional)
12. Selects the task(s)/statement(s) that was completed during the shift
  - ✓ Tasks/statements are a quick way to document the duties completed with/for the participant
  - ✓ The entry cannot be saved without a selection
13. Clicks the blue Confirm Clock Out button when ready
  - ✓ *This will stop the time for the shift*
14. Punch Confirmation
  - ✓ Punch details are shown
  - ✓ Click the blue Home button when ready



**Clock Out**

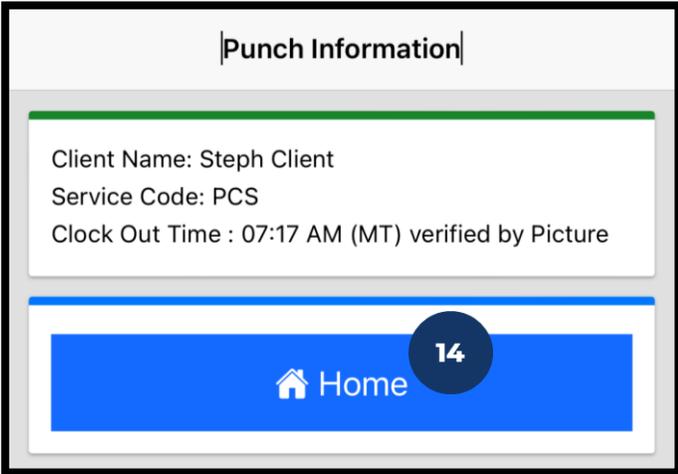
Clock Out Time: 05:23 PM (CST)

Add Notes **10**

 Add Attachment **11**

- Personal hygiene
- Cleaning **12**
- Grocery shopping

**Confirm Clock Out** **13**



**Punch Information**

Client Name: Steph Client  
Service Code: PCS  
Clock Out Time : 07:17 AM (MT) verified by Picture

 Home **14**

**Congratulations!**  
The shift is complete.

# Mobile App Video

## Clock in and Out Using Client Picture Option

Login

Username\*

Password or PIN\* 

Remember me

Login

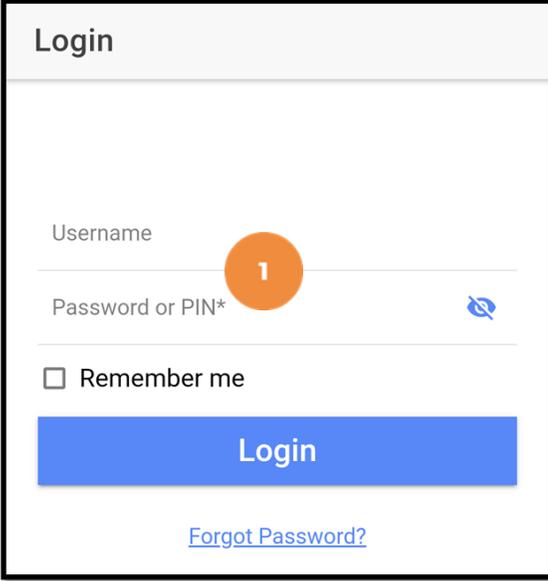
[Forgot Password?](#)

Proprietary: For Acumen and Customer Use Only

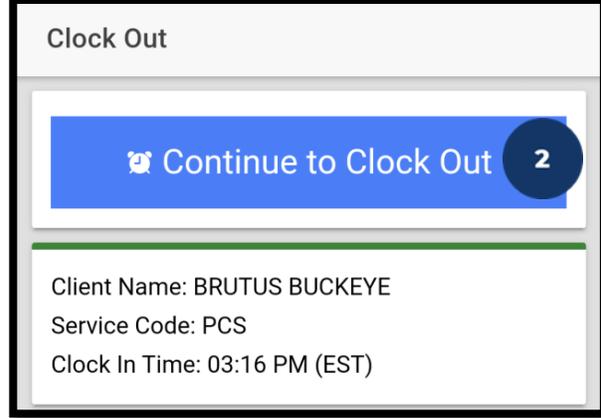
# Clock Out – EVV Option #3

## Portal Signoff

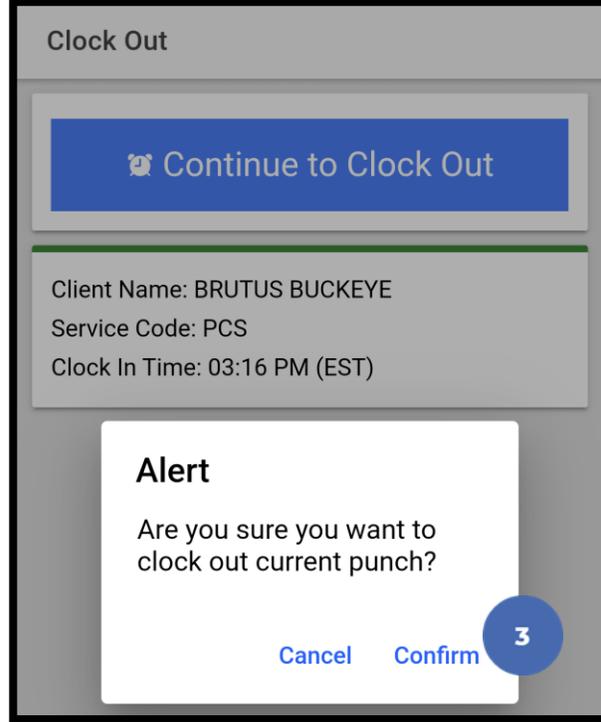
1. At the end of the shift, log in to the mobile app.
2. Click the blue **Continue to Clock Out** button
3. Select **Confirm** to proceed with clocking out



The screenshot shows the 'Login' screen of the mobile app. It features a 'Username' field, a 'Password or PIN\*' field with a blue eye icon for toggling visibility, and a 'Remember me' checkbox. A blue 'Login' button is at the bottom, with a link for 'Forgot Password?' below it. An orange circle with the number '1' is placed over the password field.



The screenshot shows the 'Clock Out' screen. At the top, there is a blue button with a clock icon and the text 'Continue to Clock Out', with a blue circle containing the number '2' to its right. Below the button, the screen displays the following information: 'Client Name: BRUTUS BUCKEYE', 'Service Code: PCS', and 'Clock In Time: 03:16 PM (EST)'.

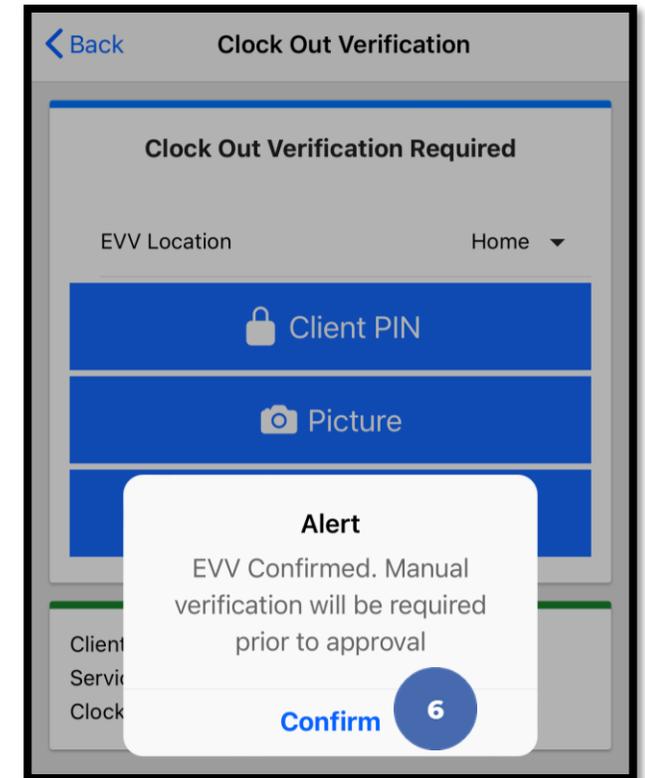
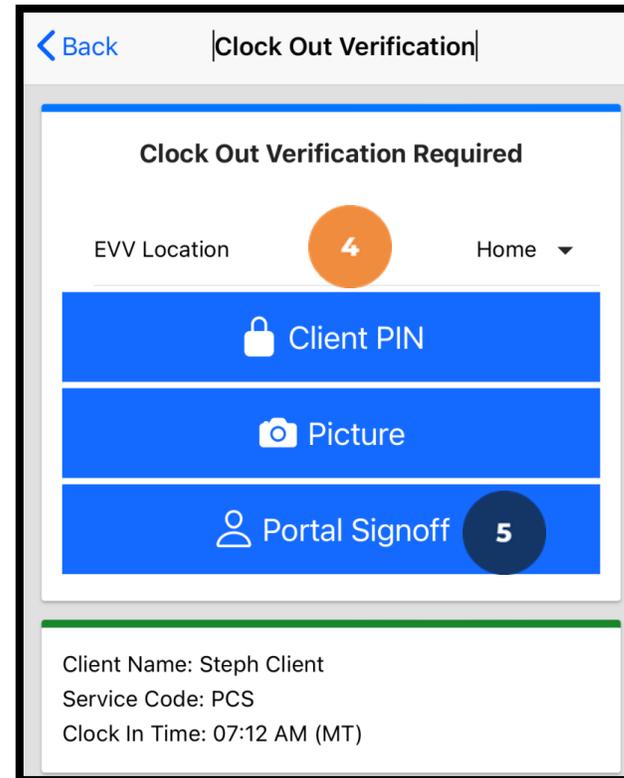


The screenshot shows the 'Clock Out' screen with an alert dialog box. The alert has the title 'Alert' and the text 'Are you sure you want to clock out current punch?'. At the bottom of the alert, there are two buttons: 'Cancel' and 'Confirm'. A blue circle with the number '3' is placed over the 'Confirm' button.

# Clock Out - EVV Option #3 (cont.)

## Portal Signoff

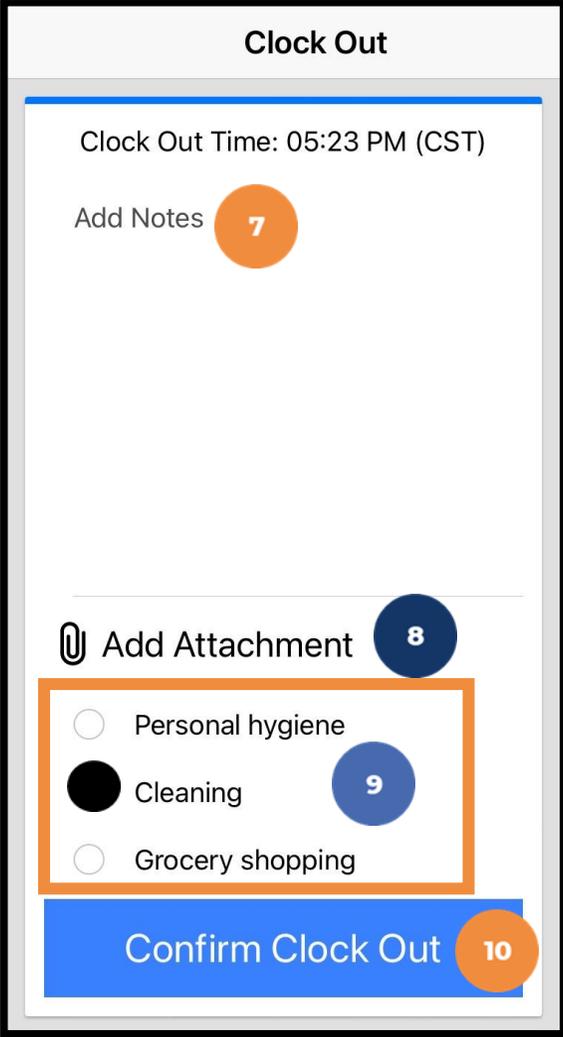
4. Select the EVV Location
5. Select the clock out verification type:  
✓ Portal Signoff
6. An alert will appear stating that EVV is confirmed, but manual verification will be required prior to approval. Click **Confirm**.



# Clock Out – EVV Option #3 (cont.)

The employee:

7. Enters any notes for the punch (optional)
8. Adds an attachment for the punch (optional)
9. Selects the task(s)/statement(s) that was completed during the shift
  - ✓ Tasks/statements are a quick way to document the duties completed with/for the participant
  - ✓ The entry cannot be saved without a selection
10. Clicks the blue Confirm Clock Out button when ready
  - ✓ *This will stop the time for the shift*
11. Punch Confirmation
  - ✓ Punch details are shown
  - ✓ Click the blue Home button when ready



**Clock Out**

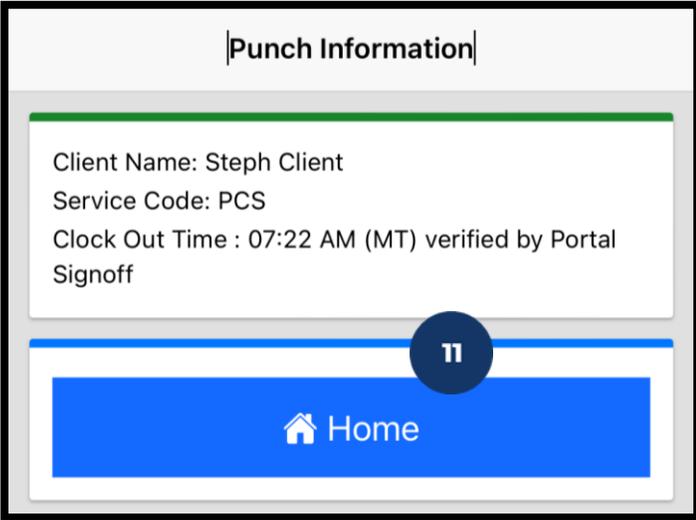
Clock Out Time: 05:23 PM (CST)

Add Notes **7**

 Add Attachment **8**

- Personal hygiene
- Cleaning **9**
- Grocery shopping

**Confirm Clock Out** **10**



**Punch Information**

Client Name: Steph Client  
Service Code: PCS  
Clock Out Time : 07:22 AM (MT) verified by Portal Signoff

**Home** **11**

**Congratulations!**  
The shift is complete.

# Mobile App Video

## Clock in and Out Using Portal Signoff Option

Login

Username\*

Password or PIN\* 

Remember me

Login

[Forgot Password?](#)

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# Mobile App Offline Mode

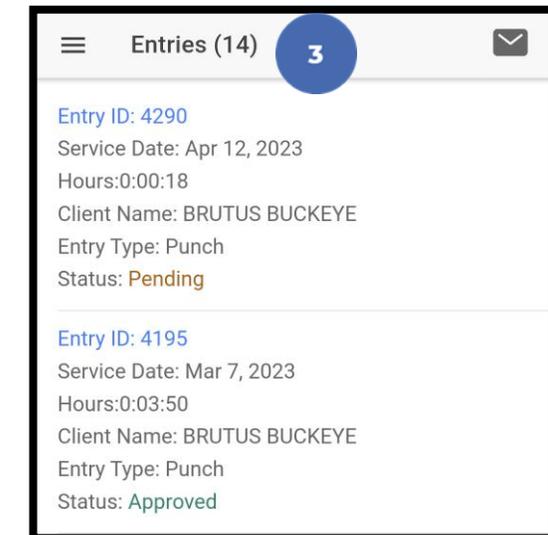
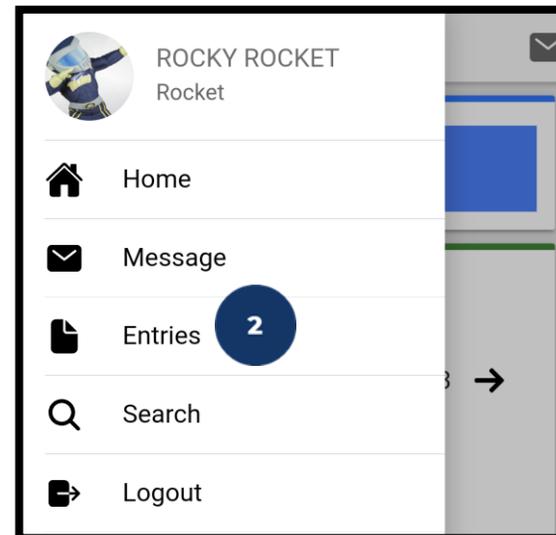
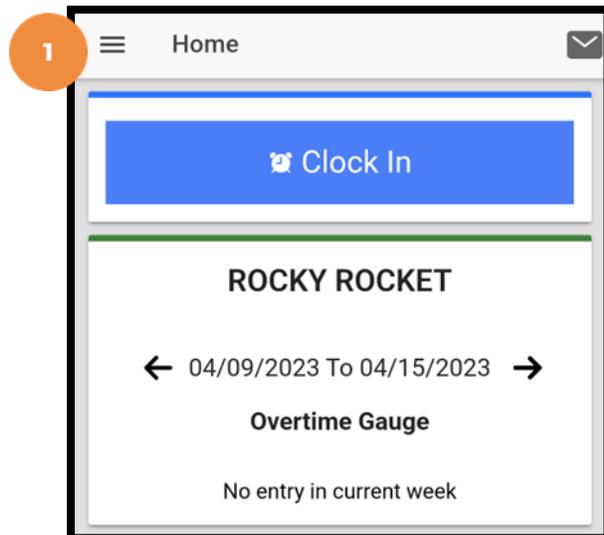


- Offline mode allows the employee to use the mobile app on a **registered device** when the device is not connected to the internet or loses connection while the app is in use
  - ✓ **Please note:** A device is registered automatically the first time the user logs into the mobile app while connected to a cellular network or internet
  - ✓ A user can only have one registered device
- Useful when there is limited or no cellular or Wi-Fi connection at the service location
- Limits users to only clock in and clock out
- Offline mode status is indicated by a **red "Offline" bar** at the top of the dashboard
- Punches made in offline mode are saved in the mobile app as offline punches, will automatically upload when the user connects to a cellular or wireless network, and will be listed under Entries.

# Review Entries

1. Click the **Menu** in the top left corner of the screen
2. Select **Entries** on the submenu
3. View the complete list of entries
  - Verify that all time is submitted
  - The employer approves the time as needed

**\*Please note:** Punches cannot be edited in the mobile app. Please edit the punch via the web portal.

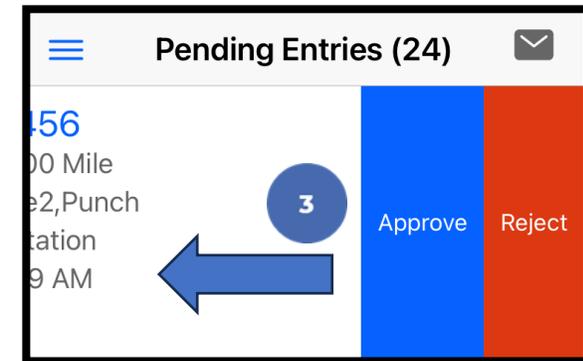
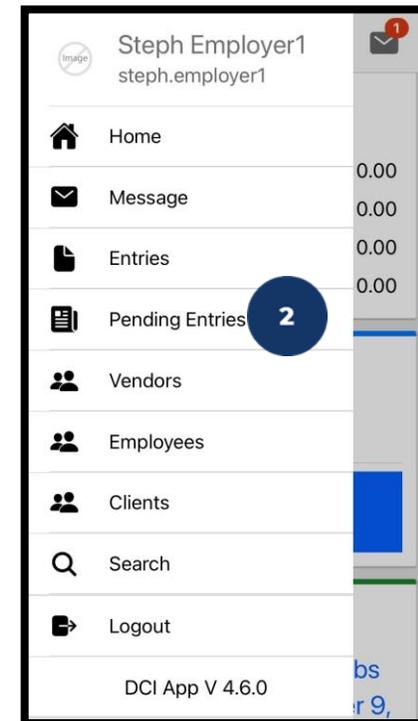
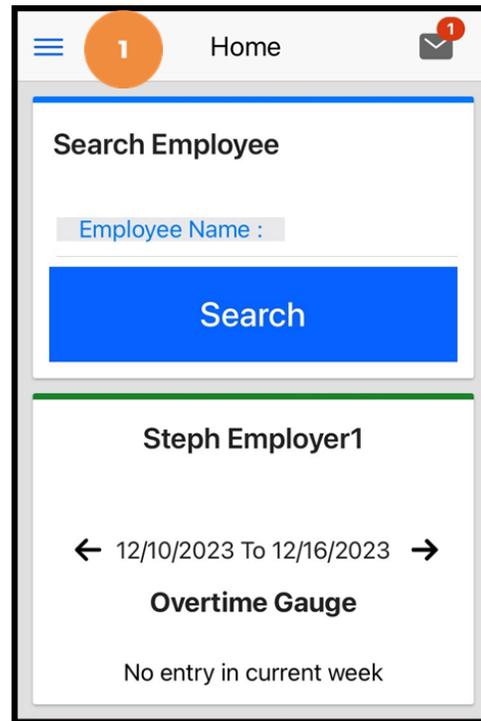


# Employer Mobile App

---

# Review & Approve Entries

1. Click the **Menu** in the top left corner of the screen
2. Select **Pending Entries** on the submenu
3. **Swipe left** on the punch to select either the blue **Approve** button or the red **Reject** button

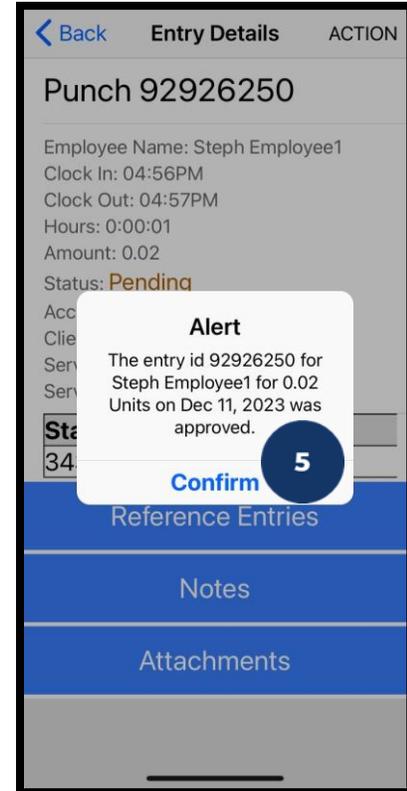
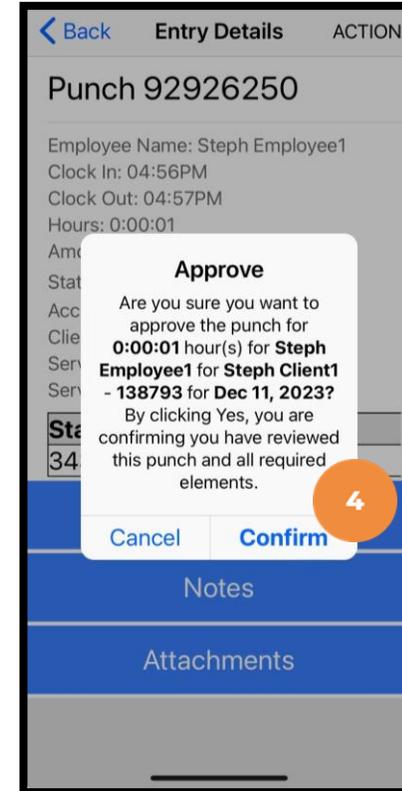
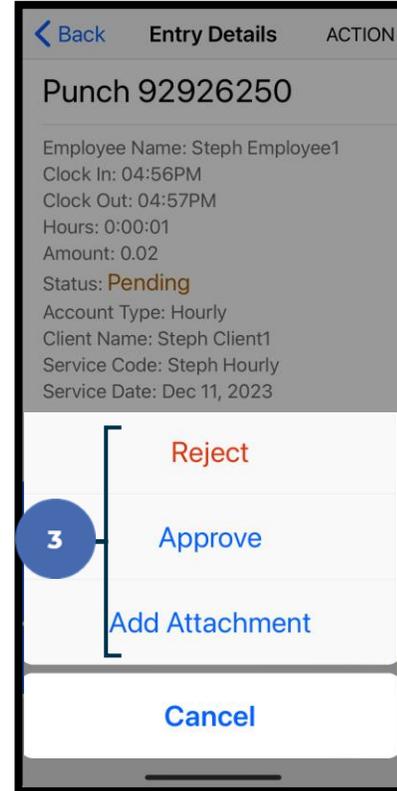
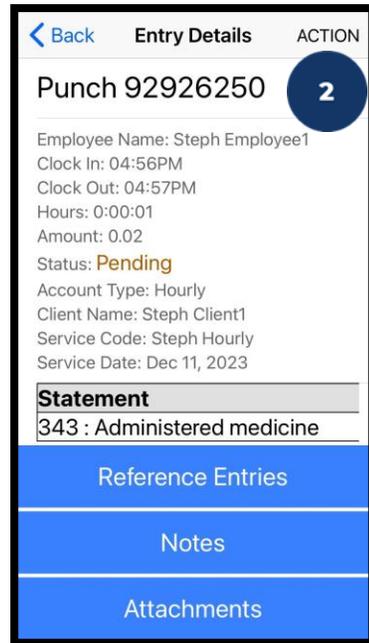
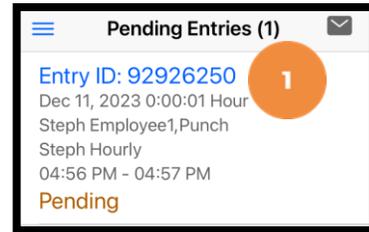


# Review & Approve Entries (cont.)



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1. Alternatively, click the blue entry ID hyperlink to open the entry details and take action
2. Click ACTION in the top right corner
3. Select Reject, Approve, or Add Attachment.
4. On the pop-up alert window, view the punch details and Click Confirm to initiate the confirmation process.
5. On the pop-up alert window, click Confirm again to complete the confirmation process.



## \*Please note:

If the action taken was to approve the entry, the status changes to Approved and the entry will be processed for payment.

\*Entries must be approved within 5 days of the date of service.

\*After 5 days the approval will be prohibited as it will violate the timely filing business rule

# Mobile App Video

## Employer Reviews & Approves Entries

|Login| EN

Username\*

Password or PIN\* 

Remember me

Login

[Forgot Password?](#)

# DCI Web Portal

Proprietary: For Acumen and Customer Use Only



# **Navigation**

---

**Full Site – Most compatible when  
accessed via desktop or laptop**



**Acumen Fiscal Agent**  
Innovation • Opportunity • Freedom

# Web Portal Basics

---

- The employer reviews and manages time
- Employees correct punches and/or enter historical time
- Users may update profile settings



# Accessing the DCI Web Portal

1. Open an internet browser on a computer or mobile device (Google Chrome is preferred) and navigate to the [DCI Web Portal](#)
2. Use the language drop-down in the top right corner to select the preferred language
  - The page will now display in the new language each time you log in
  - This feature is only available for employees
3. Enter **username** and **password**
  - Credentials provided by September 24<sup>th</sup>
4. Utilize the “**Forgot your password?**” link if needed
5. Click the blue **Sign In** button



The screenshot shows the login page for acumen.dcisoftware.com. It features a 'Sign In' header, a 'Username' field (callout 3), a 'Password' field (callout 3), a 'Remember me' checkbox, and a 'Forgot your password?' link (callout 4). A blue 'Sign In' button (callout 5) is prominently displayed. Below the button is an 'Or' separator and a 'Create a profile' link. On the right side, a language drop-down menu (callout 2) is open, showing options: English (selected), العربية, 中文, Русский, Soomaali, Español, and Tiếng Việt.

**\*Please note:** Contact Acumen with login issues

# Profile Settings

**\*Please note!** Profile settings are only available on the full site

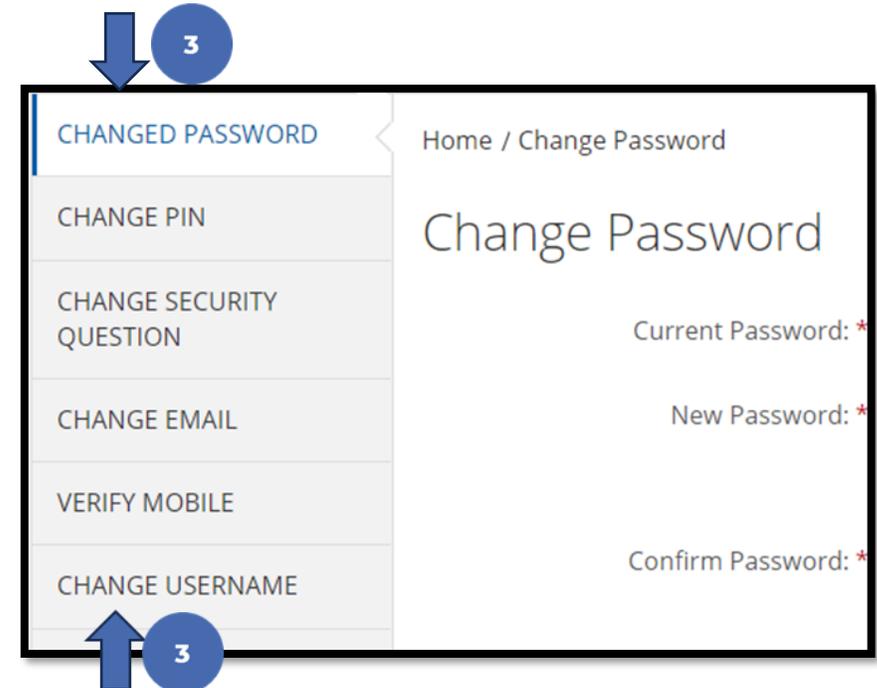
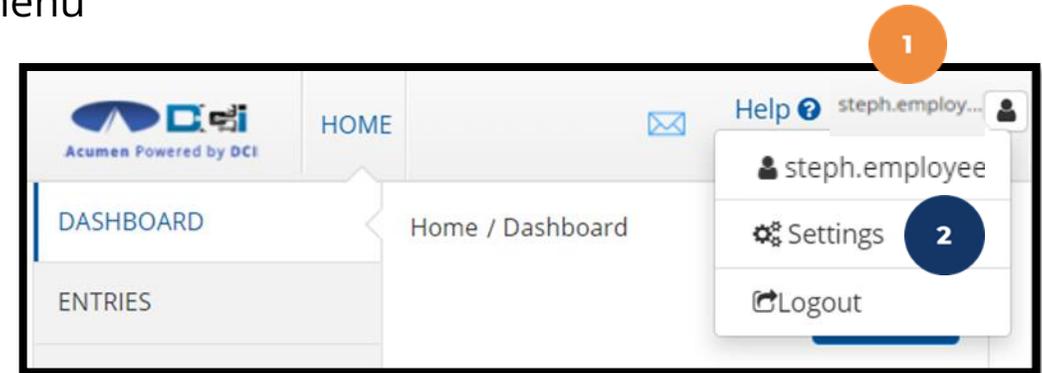


1. Click the **username** in the top right corner of the main menu

2. Click **Settings**

3. Select a submenu tab to update:

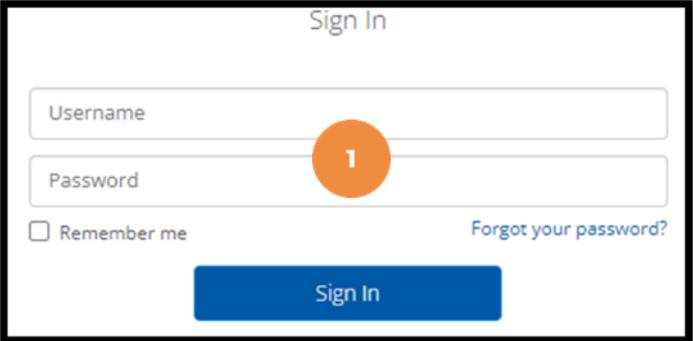
- Change Password – Used for login
- Change PIN – A number that can be used instead of a password when logging into the mobile app. *Required for employees if using Phone EVV.*
- Change Security Question
- Change Email – A valid and correct email address is required for password recovery
- Verify Mobile
- Change Username – Used for login



# Add / Change PIN

**\*Please Note!** The PIN can only be added or changed in the web portal

1. Log in to the DCI web portal
2. Click the username in the top right corner of the main menu
3. Click **Settings** from the drop-down menu
  - ✓ Add New PIN after a reset
  - ✓ Change PIN anytime
5. Enter password
6. Click the blue **Verify** button

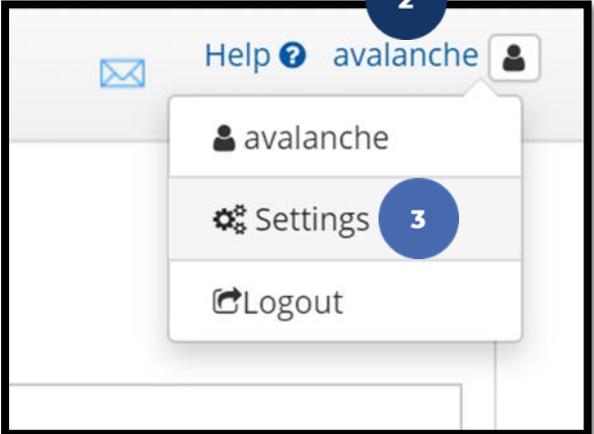


Sign In

Username

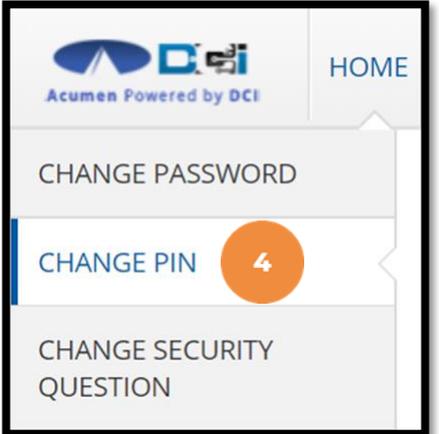
Password

Remember me [Forgot your password?](#)



Help ? avalanche

- avalanche
- Settings**
- Logout



Acumen Powered by DCI HOME

- CHANGE PASSWORD
- CHANGE PIN**
- CHANGE SECURITY QUESTION



Password: \*

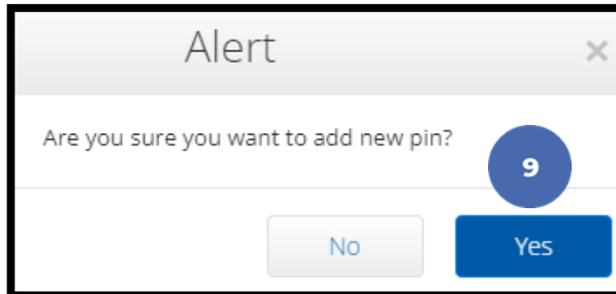
# Add / Change PIN (cont.)

7. Complete the New Pin field and retype the pin in the Confirm Pin field
8. Click the blue **Change Pin** button
9. Select **Yes** to confirm the pin change
10. A green bar stating “Pin Changed Successfully!” appears



The screenshot shows a form with two input fields. The first field is labeled "New Pin: \*" and contains the placeholder text "Please enter New Pin". The second field is labeled "Confirm Pin: \*" and contains the placeholder text "Please Confirm Pin". A blue circle with the number "7" is positioned over the second field. To the right of the fields are two buttons: a grey "Cancel" button and a blue "Change Pin" button. A blue circle with the number "8" is positioned over the "Change Pin" button.

**\*Please Note!** The PIN can only be added or changed in the web portal

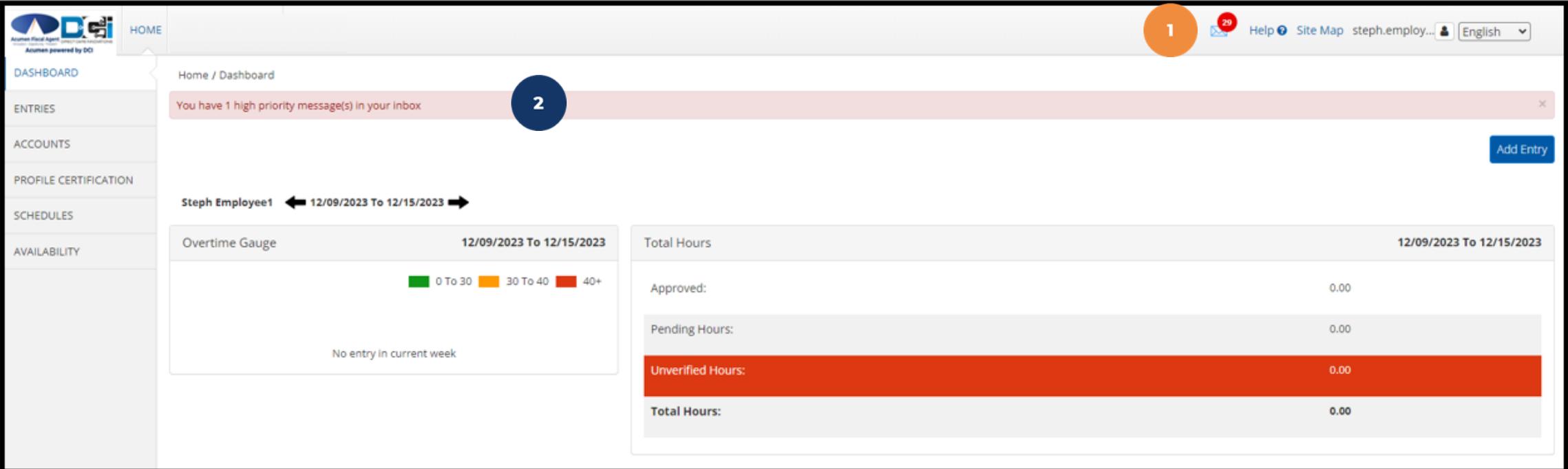


The screenshot shows a dialog box titled "Alert" with a close button (X) in the top right corner. The text inside the dialog reads "Are you sure you want to add new pin?". Below the text are two buttons: a grey "No" button and a blue "Yes" button. A blue circle with the number "9" is positioned over the "Yes" button.



# Web Portal Messaging Module

1. Click the **Mail** icon (envelope) in the top right corner of the main menu to access the inbox
2. Alternatively, if the red **high priority message banner** displays, click it to access the inbox.



The screenshot shows the Acumen Fiscal Agent web portal dashboard. The top navigation bar includes the logo, 'HOME', and user information. A red notification bubble with the number '1' is visible in the top right corner. A red banner at the top of the main content area reads 'You have 1 high priority message(s) in your inbox' with a blue circle containing the number '2' next to it. Below the banner, the user's name 'Steph Employee1' and the date range '12/09/2023 To 12/15/2023' are displayed. The main content area is divided into two sections: an 'Overtime Gauge' and a 'Total Hours' summary table.

Total Hours	12/09/2023 To 12/15/2023
Approved:	0.00
Pending Hours:	0.00
Unverified Hours:	0.00
<b>Total Hours:</b>	<b>0.00</b>

# Web Portal Messaging Module

Select a message to view by clicking anywhere on the line

- ✓ Bold text indicates the message has not been read
- ✓ Light text indicates the message has been read
- ✓ A yellow star indicates a high priority message
- ✓ A paperclip indicates an attachment



Archive Delete Export

Showing 30 out of 72 records

<input type="checkbox"/>	★	Attachments	From	Subject	Date/Time	Action
<input type="checkbox"/>	★		DCI Support	<b>Paystub for check date XX/XX/XXXX</b>	11/02/2023 02:00 AM	
<input type="checkbox"/>	★		Kristen Ziegler	hello there	12/08/2023 05:19 PM	
<input type="checkbox"/>	★		Steph Client1	Checking on the status	11/02/2023 11:50 AM	
<input type="checkbox"/>	★		DCI Support	Punch Rejected	10/12/2023 08:33 AM	

# View Paystubs/Statements via Messaging Module

1. Locate the Paystub/Statement message in the inbox and click anywhere on the line to view it
2. Click the **Attachments** tab
3. Click the **eye** icon in the download column to view the paystub/statement or the **download** icon to download it

<input type="checkbox"/>	★	Attachments	From	Subject	Date/Time	Action
<input type="checkbox"/>	★		DCI Support	Paystub for check date XX/XX/XXXX	07:13 PM	 

Notes **Attachments** 2

<input type="checkbox"/>	Date	File Name	File Type	File Size	Added By	Download	Status
<input type="checkbox"/>	Dec 08, 2023	<b>Paystub.pdf</b>		2554.02 KB	Kristen Ziegler	 	Active

# Employee Web Portal

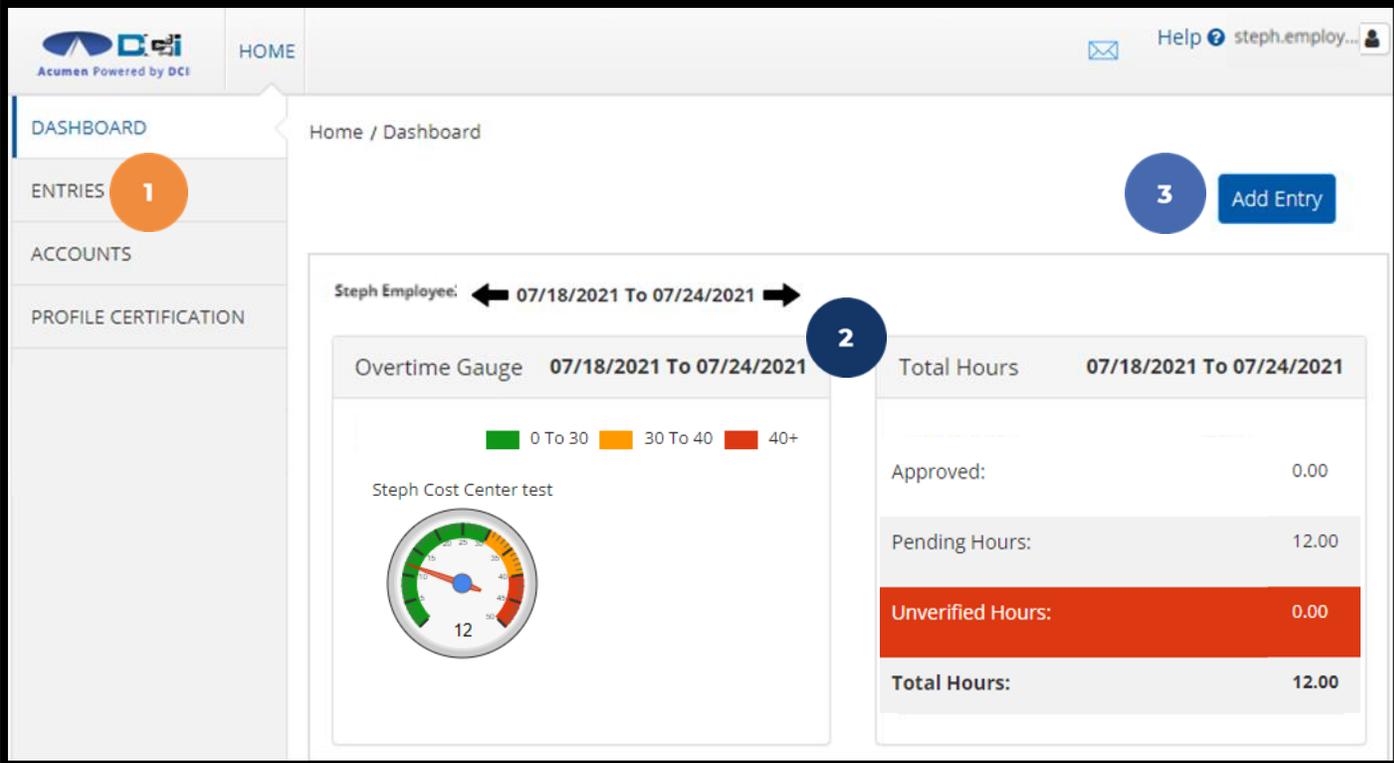
---

**\*Please note!** Web Portal (historical) entries are only used for a missed punch or punch correction due to service interruption. The goal should always be to enter punches in real time (Mobile App) to maintain EVV compliance.

# Home Tab Details - Employee

The Dashboard is the landing page

1. Select the **Entries** tab to view a complete list of submitted time entries
2. Overtime Gauge & Total Hours for the current calendar week
3. Click **Add Entry** to enter a historical time punch



Acumen Powered by DCI

HOME

Help steph.employ...

DASHBOARD Home / Dashboard

ENTRIES 1

ACCOUNTS

PROFILE CERTIFICATION

3 Add Entry

Steph Employee: 07/18/2021 To 07/24/2021

Overtime Gauge 07/18/2021 To 07/24/2021

0 To 30 30 To 40 40+

Steph Cost Center test

12

Total Hours 07/18/2021 To 07/24/2021

Approved:	0.00
Pending Hours:	12.00
Unverified Hours:	0.00
Total Hours:	12.00



# Add New Entry

1. Log in to the [DCI Web Portal](#)
2. Click the blue Add Entry button

**\*Please note!** Web Portal (historical) entries are only used for a missed punch or punch correction due to service interruption. The goal should always be to enter punches in real time (Mobile App) to maintain EVV compliance.

Sign In

Username

Password

Remember me [Forgot your password?](#)

Sign In

Home > Dashboard

Help spongebob

steph.employ...

SPONGEBOB ← 11/01/2020 to 11/07/2020 →

Steph Employee: auge 11/01/2020 to 11/07/2020

0 to 30 30 to 40 40+

No entry in current week

Total Hours 11/01/2020 to 11/07/2020

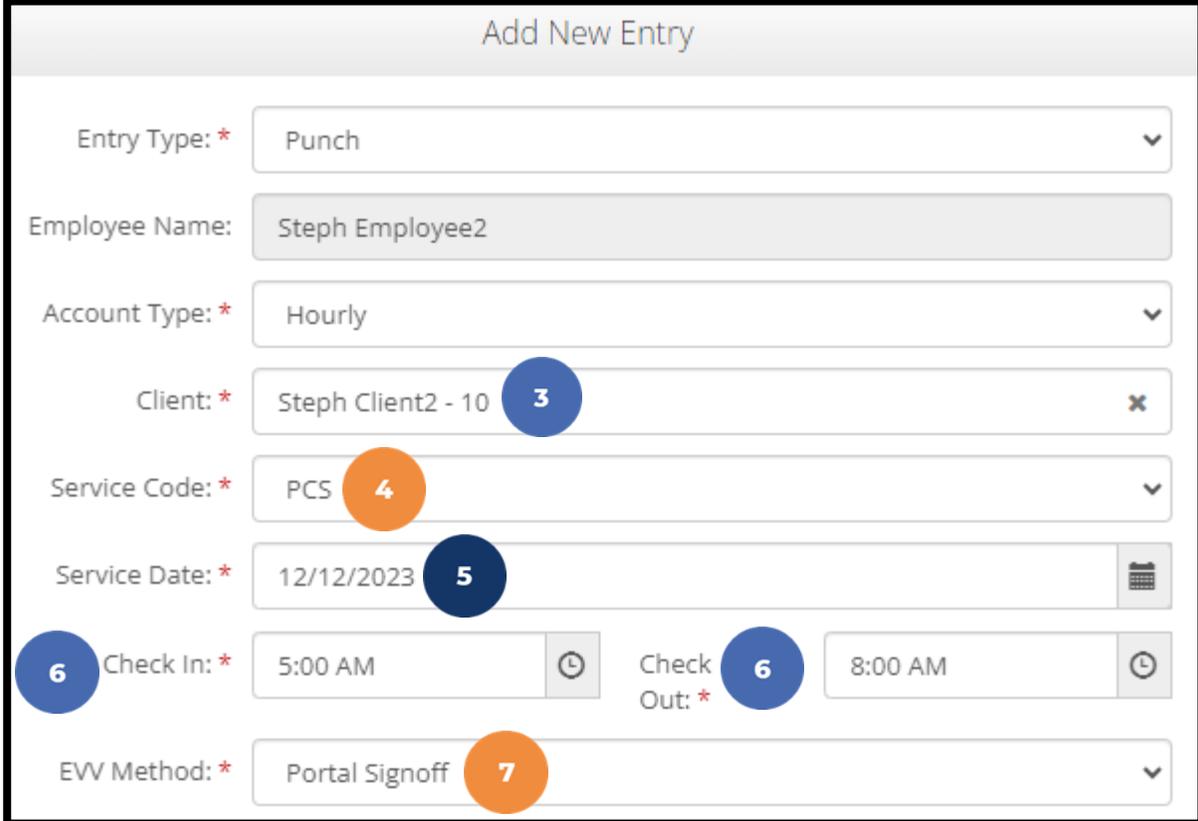
Approved By:	7.52
Pending Hours:	0.00
Unverified Hours:	0.00
Total Hours:	7.52

Expiring Certifications

Certification Name	Certification Expiration Date	Link to Certification Course
--------------------	-------------------------------	------------------------------

# Add New Entry (cont.)

3. Type a minimum of three characters to generate results and select the Client's name from the list
4. Select the Service Code from the drop-down
5. Select the Service Date
6. Enter the Check In (start) and Check Out (end) times
7. Select Portal Signoff as the EVW Method

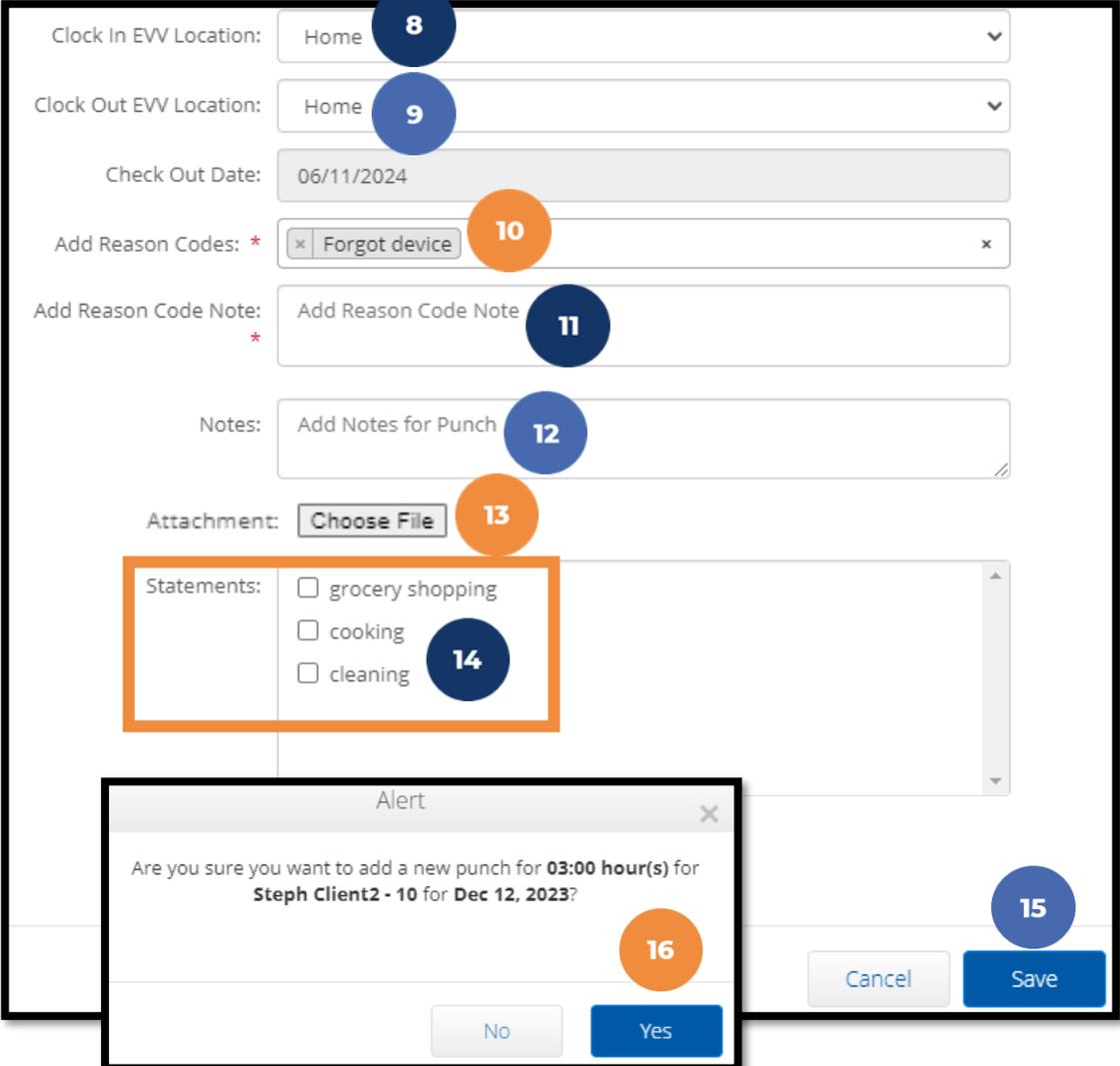


The screenshot shows the 'Add New Entry' form with the following fields and values:

- Entry Type: \* Punch
- Employee Name: Steph Employee2
- Account Type: \* Hourly
- Client: \* Steph Client2 - 10 (Callout 3)
- Service Code: \* PCS (Callout 4)
- Service Date: \* 12/12/2023 (Callout 5)
- Check In: \* 5:00 AM (Callout 6)
- Check Out: \* 8:00 AM (Callout 6)
- EVW Method: \* Portal Signoff (Callout 7)

# Add New Entry (cont.)

8. Select the Clock In EVV Location
9. Select the Clock Out EVV Location
10. Select a Reason Code from the drop-down list
11. Add a Reason Code Note
12. Enter Notes for the punch (optional)
13. Click the **Choose File** button to select and upload Attachments (optional)
14. Select the task(s)/statement(s) that was completed during the shift
  - ✓ Tasks/statements are a quick way to document the duties completed with/for the participant
  - ✓ The entry cannot be saved without a selection
15. Click **Save**
16. Click **Yes** to submit

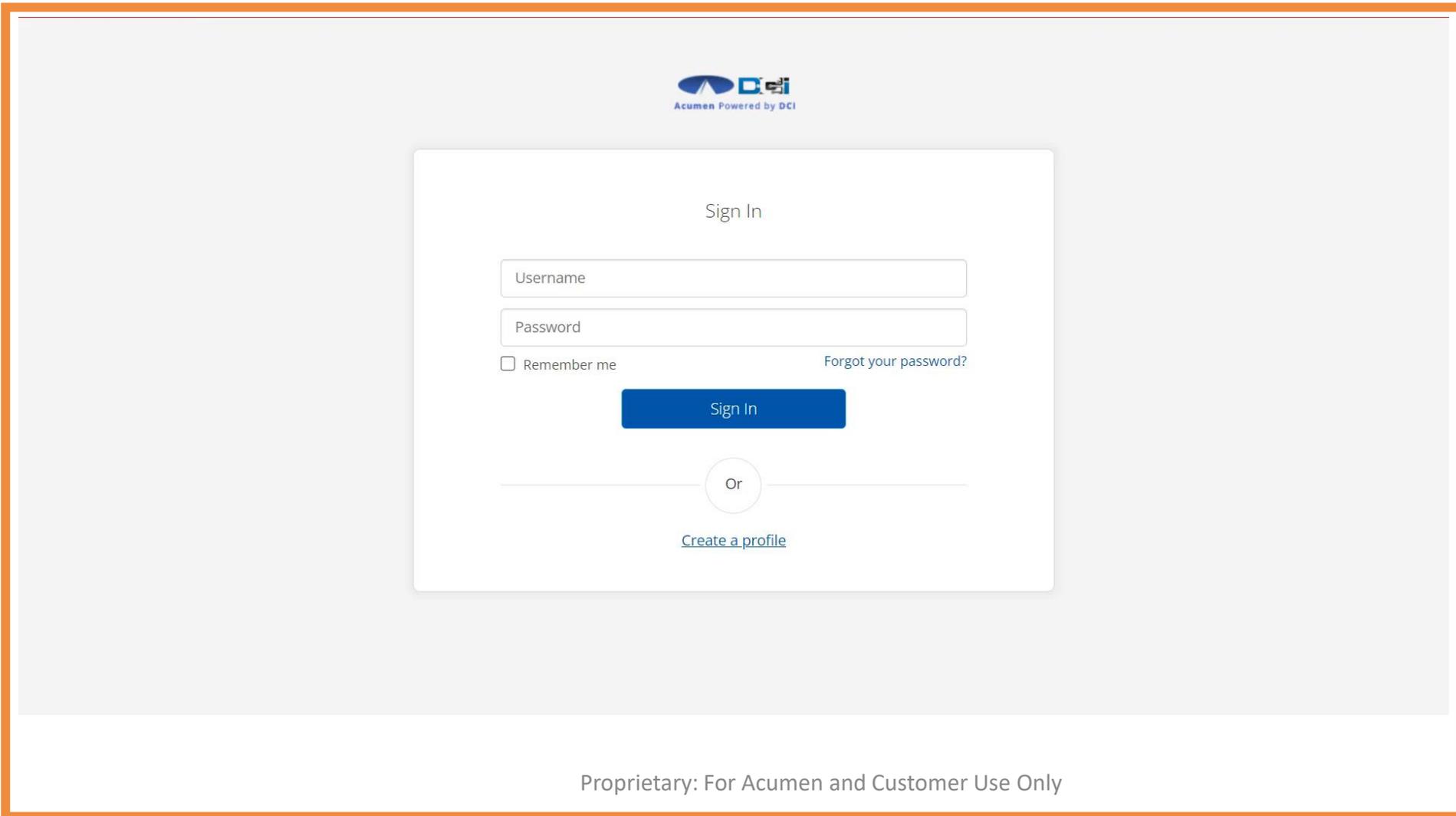


The screenshot displays the 'Add New Entry' form with the following elements and callouts:

- 8**: Clock In EVV Location dropdown menu.
- 9**: Clock Out EVV Location dropdown menu.
- 10**: Add Reason Codes field containing 'Forgot device'.
- 11**: Add Reason Code Note text area.
- 12**: Notes text area containing 'Add Notes for Punch'.
- 13**: Attachment field with a 'Choose File' button.
- 14**: Statements list with checkboxes for 'grocery shopping', 'cooking', and 'cleaning'.
- 15**: Save button at the bottom right.
- 16**: Alert modal dialog with the text: 'Are you sure you want to add a new punch for 03:00 hour(s) for Steph Client2 - 10 for Dec 12, 2023?' and 'Yes'/'No' buttons.

# Web Portal Video

## Employee Adds (Historical) Entry



Proprietary: For Acumen and Customer Use Only



# Edit Entry

**\*Please note!** Only entries in a Pending status can be edited by the employee. Contact Acumen for assistance if in any other status.



1. Log in to the [DCI Web Portal](#)
2. Click **Entries** on the submenu
3. Click anywhere on the line of the punch entry to be edited
4. Click the **Actions** button in the top right corner
5. Select **Edit Entry** from the drop-down menu

Sign In

Username 1

Password

Remember me [Forgot your password?](#)

Sign In

Acumen Powered by DCI

HOME

DASHBOARD

**ENTRIES 2**

ACCOUNTS

PROFILE CERTIFICATION

Id	Service Date	Start Time	End Time	Type	Account Type	Ref.	Client Name	Service Code	Amount	Unit Type	Status
<a href="#">92926243</a>	Dec 02, 2023	10:30 AM	02:30 PM	Punch	Hourly	<span>3</span>	<a href="#">Steph_Client1</a>	Steph Hourly	0:04:00	Hourly	Pending

Actions 4

- New Note
- New Attachment
- Edit Entry 5**
- Reject



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# Edit Entry (cont.)

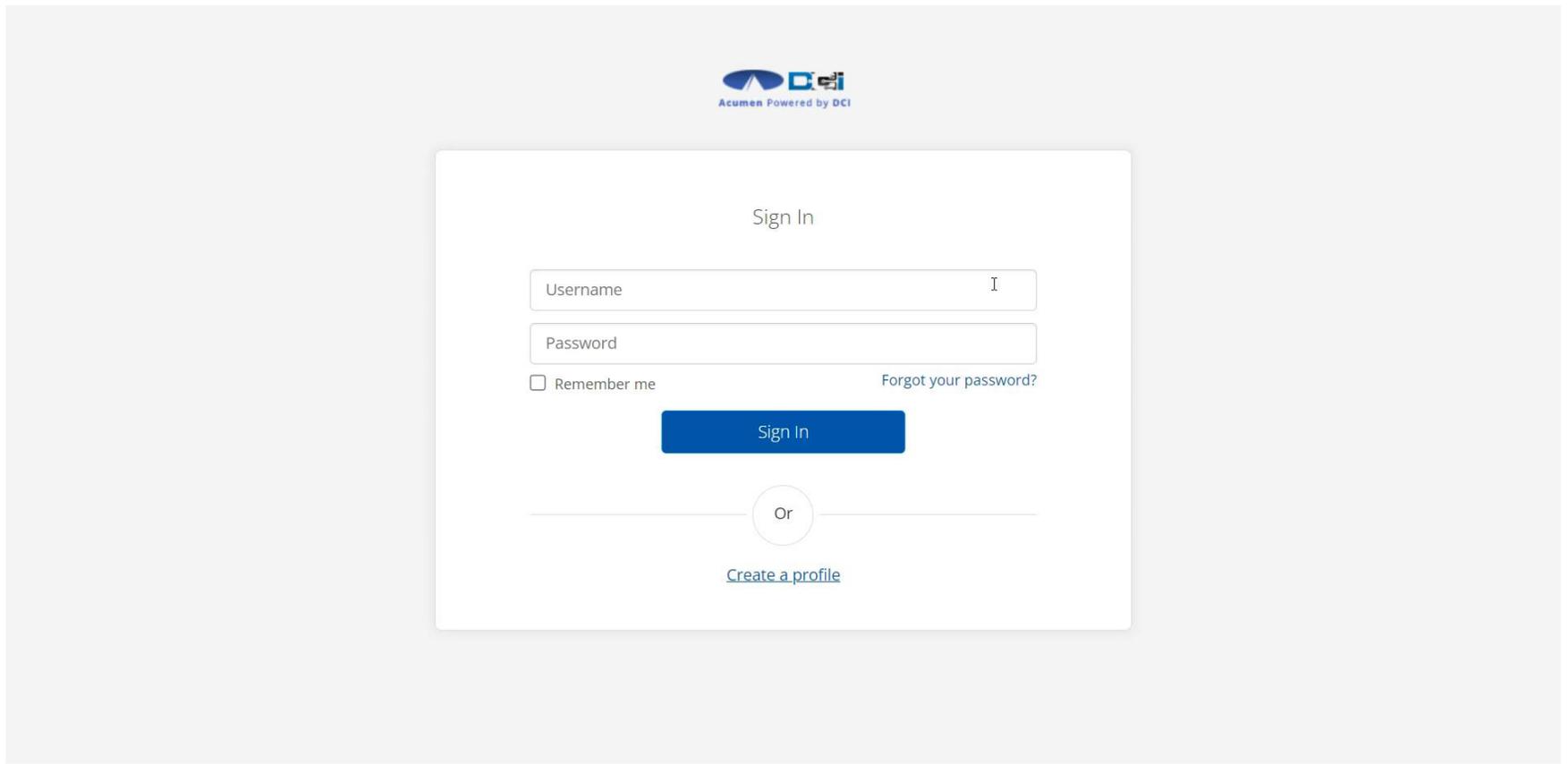
**\*Please note!** Only entries in a Pending status can be edited by the employee

6. Complete the necessary changes in the Edit Entry form wizard
7. Select a Reason Code from the drop-down list
8. Add Reason Code Note
9. Click **Save**
10. Click **Yes** to confirm the changes

The edited entry moves into a Rejected status, and a new (corrected) entry in Pending status is created.

# Web Portal Video

# Employee Edits (Historical) Entry



The screenshot shows a web portal sign-in page for Acumen. At the top center is the Acumen logo with the text "Acumen Powered by DCI". Below the logo is a "Sign In" heading. There are two input fields: "Username" and "Password". Below the "Username" field is a small "I" icon. Below the "Password" field is a "Remember me" checkbox and a "Forgot your password?" link. A blue "Sign In" button is centered below the fields. Below the button is a horizontal line with a circle containing the word "Or" in the center. Below the line is a "Create a profile" link.

Proprietary: For Acumen and Customer Use Only



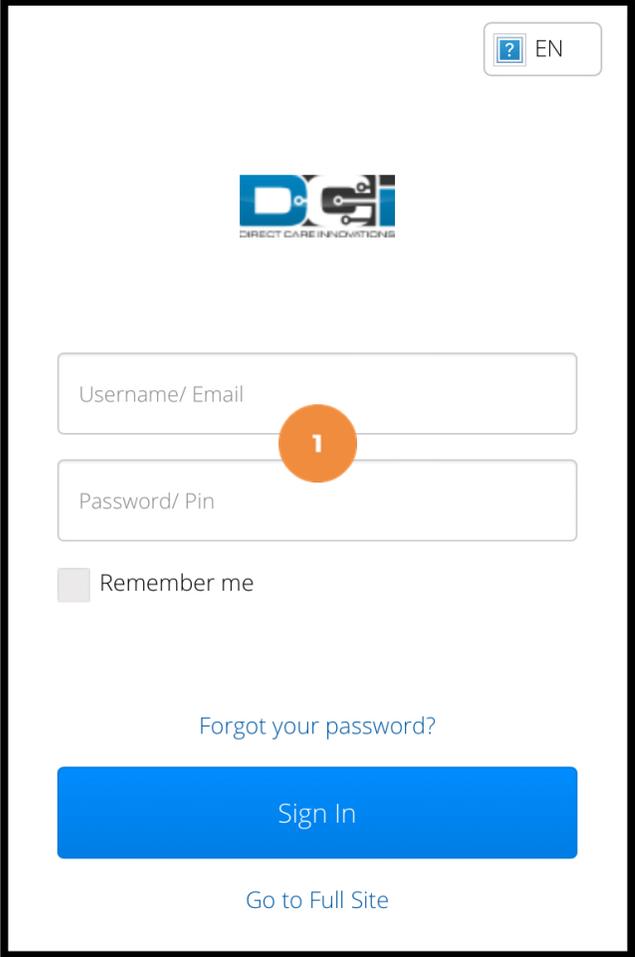
# Employee Mobile Web Portal

---

**Accessed via smartphone or tablet**

**\*Please note!** Mobile Web Portal (historical) entries are only used for a missed punch or punch correction due to service interruption. The goal should always be to enter punches in real time (Mobile App) to maintain EVV compliance.

# Add New Entry - Mobile Web



EN

DCI  
DIRECT CARE INNOVATIONS

Username/ Email

1

Password/ Pin

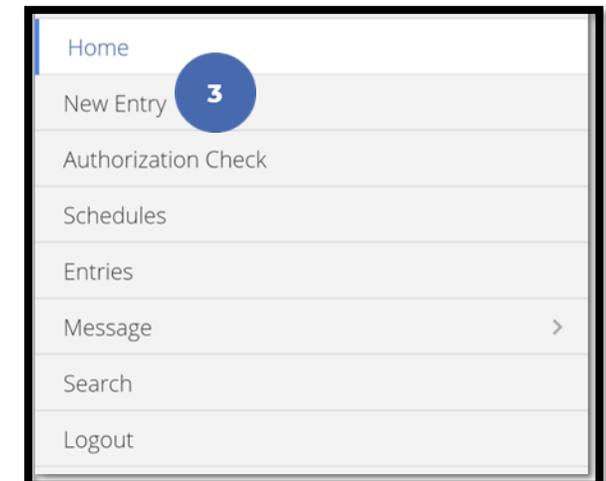
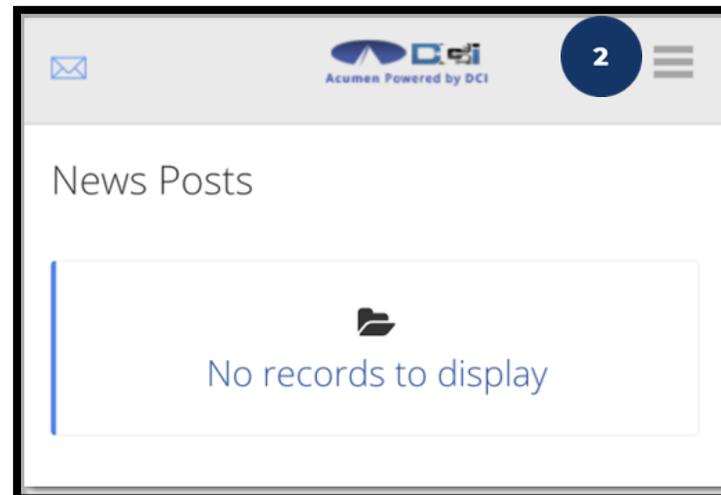
Remember me

[Forgot your password?](#)

Sign In

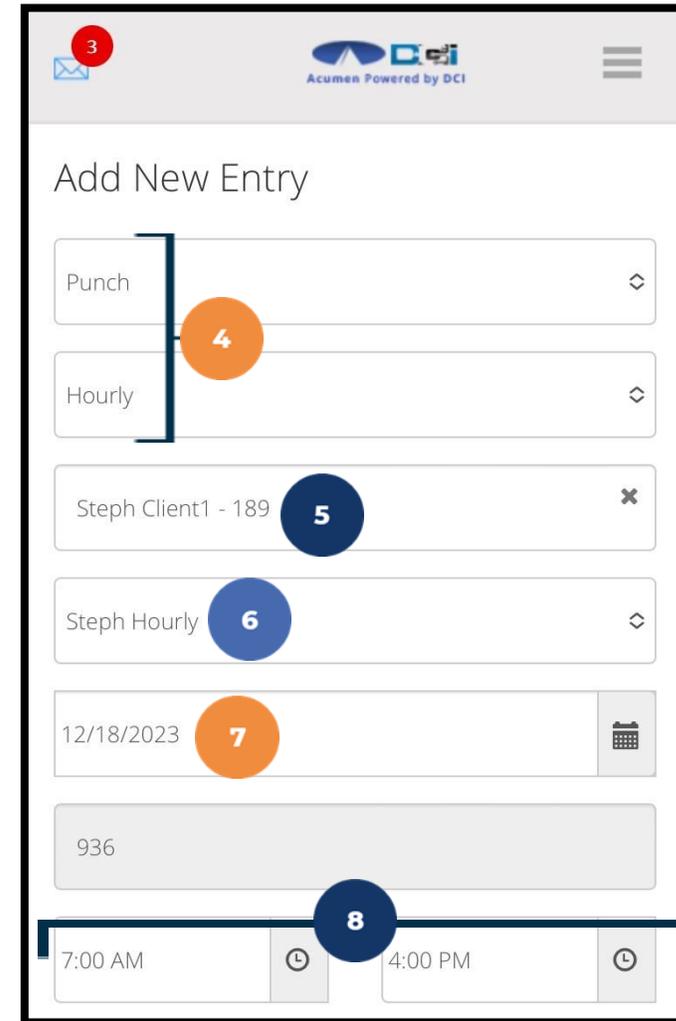
[Go to Full Site](#)

1. Log in to the DCI Web Portal on a mobile device
2. Click the **Menu** in the top right corner of the screen
3. Select the **New Entry** tab from the submenu



# Add New Entry - Mobile Web (cont.)

4. The first two fields are prefilled
5. Type a minimum of three characters to generate results and select the Client's name from the list
6. Select the Service Code from the drop-down
7. Select the Service Date
8. Enter the Check In (start) and Check Out (end) times



3

Acumen Powered by DCI

### Add New Entry

Punch

4

Hourly

5

Steph Client1 - 189

6

Steph Hourly

7

12/18/2023

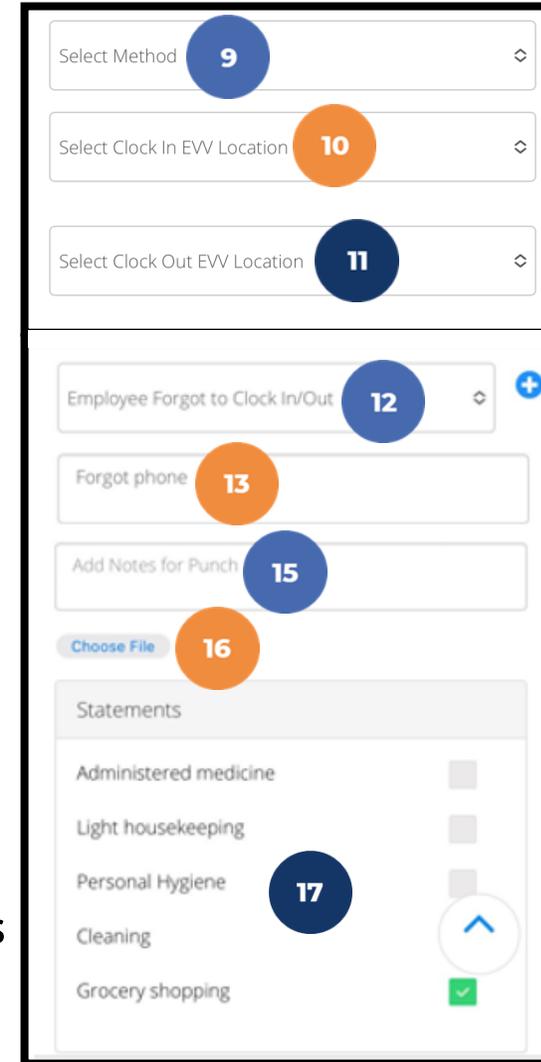
936

8

7:00 AM 4:00 PM

# Add New Entry - Mobile Web (cont.)

9. Select Portal Signoff as the Method
10. Select the Clock In EVV Location
11. Select the Clock Out EVV Location
12. Select a Reason Code from the drop-down list
13. Add a Reason Code Note
14. Click the blue plus sign (+) to populate the reason code details
15. Enter Notes for the punch (optional)
16. Click the **Choose File** button to select and upload Attachments (optional)
17. Select the task(s)/statement(s) that was completed during the shift
  - ✓ Tasks/statements are a quick way to document the duties completed with/for the participant
  - ✓ The entry cannot be saved without a selection



Select Method 9

Select Clock In EVV Location 10

Select Clock Out EVV Location 11

Employee Forgot to Clock In/Out 12

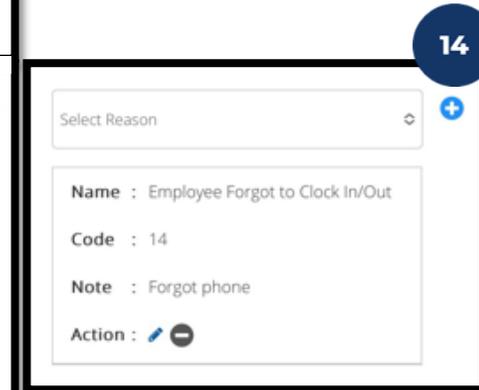
Forgot phone 13

Add Notes for Punch 15

Choose File 16

Statements

- Administered medicine
- Light housekeeping
- Personal Hygiene 17
- Cleaning
- Grocery shopping



Select Reason 14

Name : Employee Forgot to Clock In/Out

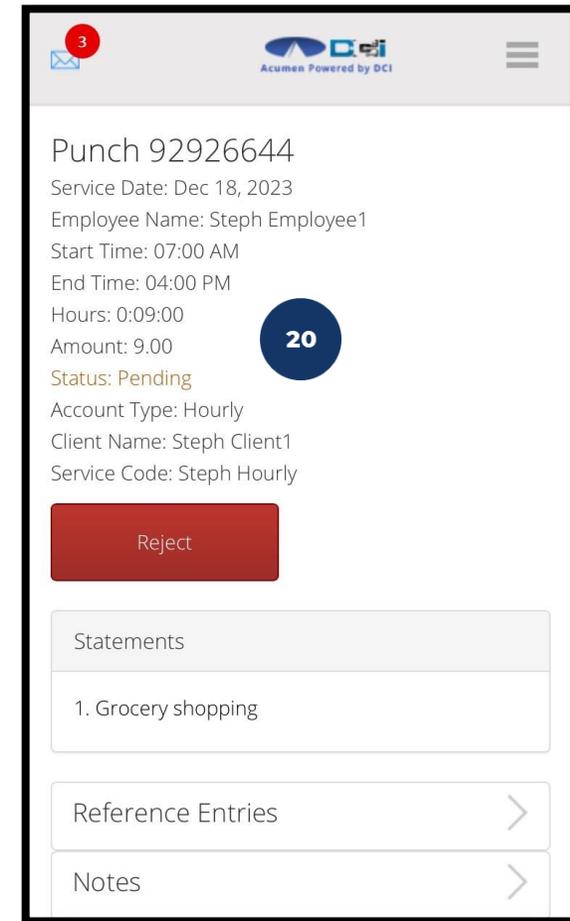
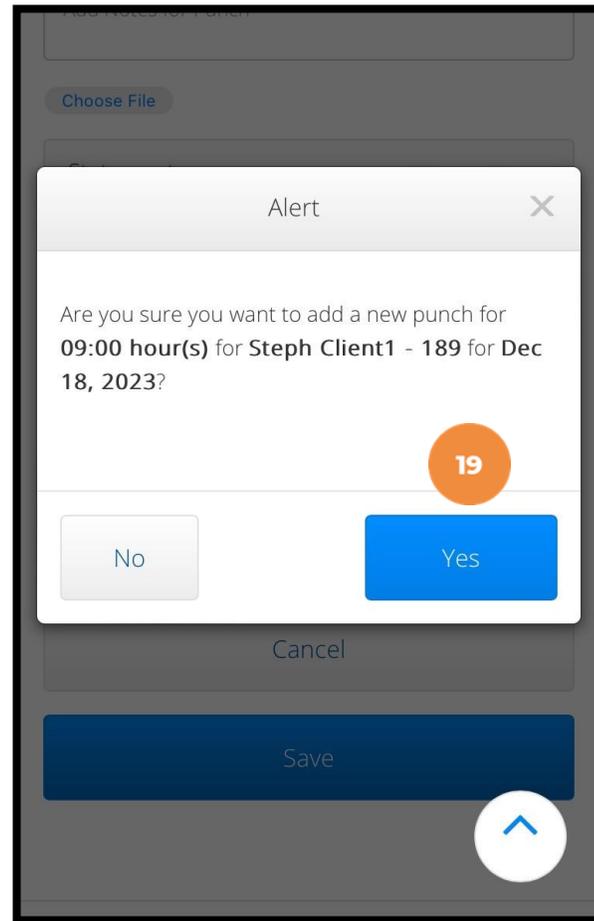
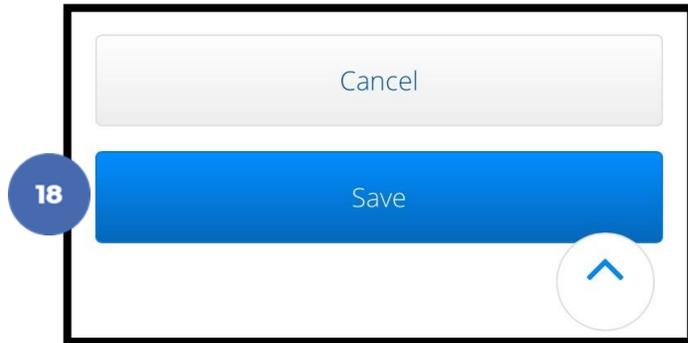
Code : 14

Note : Forgot phone

Action :

# Add New Entry - Mobile Web (cont.)

18. Click Save
19. Click Yes to submit
20. The punch has been submitted



# Employer Web Portal

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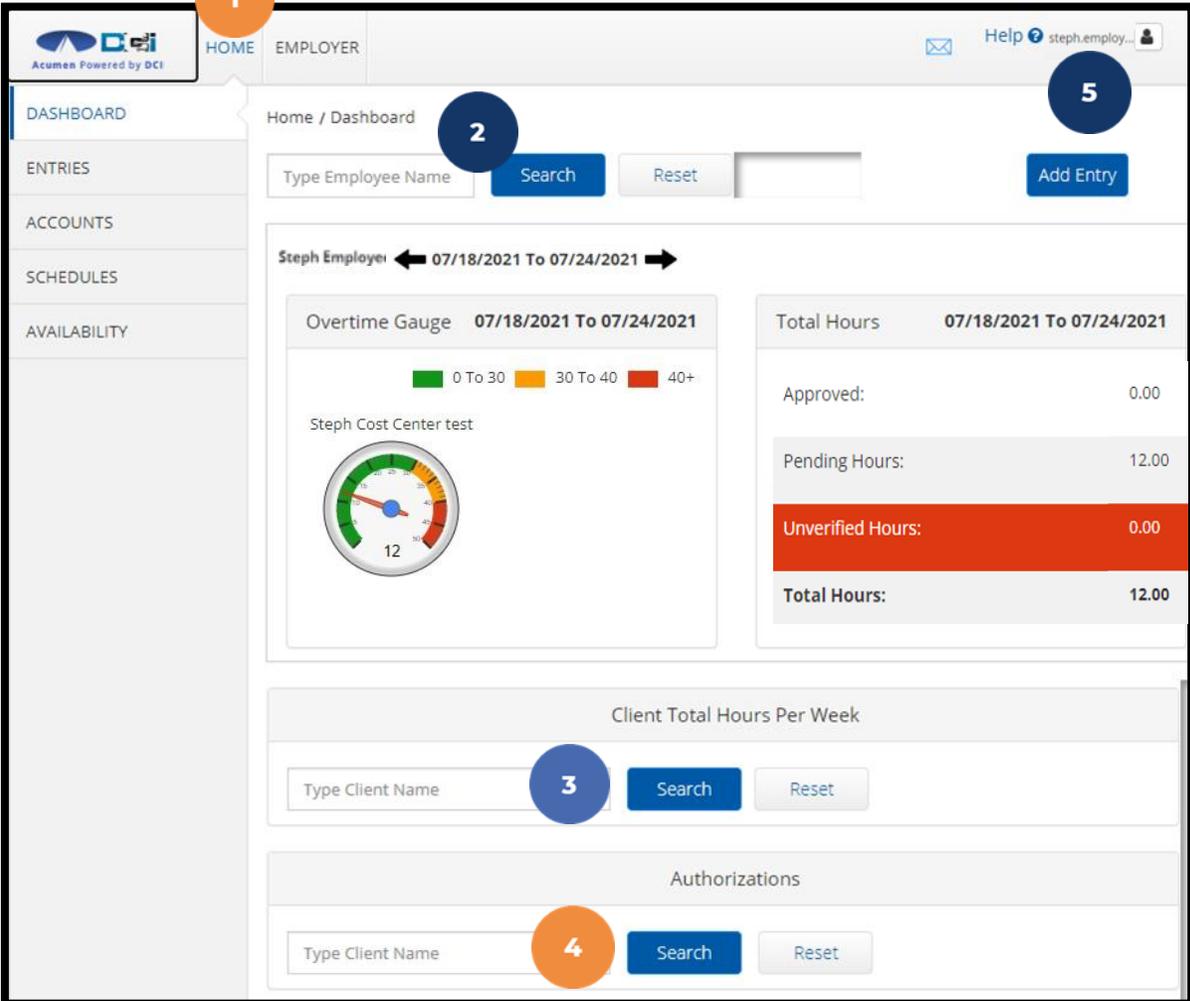
**Full Site – Most compatible when accessed via computer or laptop**

**\*Please note!** Employer mobile web portal actions are similar to the web portal but are compatible with a mobile device and do not require horizontal scrolling.

# Home Tab Details

1. Select **Home** on the main menu
2. Enter an **employee name** and click the blue **Search** button to view the information below by week. Use the black arrows to toggle between weeks:
  - ✓ Overtime Gauge
  - ✓ Total Hours breakdown
3. Client Total Hours Per Week Widget
  - ✓ Enter the **client name** and click the blue **Search** button to view the total hours worked for the client by week
4. Authorizations (Budget) Widget
  - ✓ Enter the **client name** and click the blue **Search** button to view details of all active authorizations (budgets) detailed on next slide
5. Profile Settings

The Dashboard is the landing page



The screenshot shows the Acumen Fiscal Agent dashboard interface. It features a top navigation bar with 'HOME' and 'EMPLOYER' tabs, and a user profile section. A left sidebar contains menu items: DASHBOARD, ENTRIES, ACCOUNTS, SCHEDULES, and AVAILABILITY. The main content area is titled 'Home / Dashboard' and includes a search bar for 'Type Employee Name' with a blue 'Search' button and a 'Reset' button. Below the search bar, there's a section for 'Steph Employee' with a date range selector '07/18/2021 To 07/24/2021'. This section contains an 'Overtime Gauge' widget with a circular gauge showing '12' and a 'Total Hours' table. The table lists 'Approved: 0.00', 'Pending Hours: 12.00', 'Unverified Hours: 0.00', and 'Total Hours: 12.00'. Below this, there's a 'Client Total Hours Per Week' widget with a search bar for 'Type Client Name' and a blue 'Search' button. At the bottom, there's an 'Authorizations' widget with another search bar for 'Type Client Name' and a blue 'Search' button. Numbered callouts (1-5) are placed over the interface to highlight key elements: 1 points to the 'HOME' tab, 2 to the 'Search' button, 3 to the 'Search' button in the 'Client Total Hours Per Week' widget, 4 to the 'Search' button in the 'Authorizations' widget, and 5 to the user profile icon.

# Authorizations (Service Plan) Widget



- The authorizations (service plan) widget allows the user to search by client (required) or optionally use the date filter to view approved authorizations (service plan) in the past, present, or future.
- As employees clock in/out, their time (units) will be deducted from the authorization and placed into a pre-authorization hold.
- Units in a pre-authorization hold remain in that status until billing and payroll have been processed. After payroll and billing completion, the units that were previously in a pre-authorization hold status will be deducted from the remaining balance and an updated remaining balance will be displayed.

Authorizations

KZ Client2 - T45158 06/18/2024 Search Reset **Display as Time** ← **Authorizations display as units.** Click to display as time.

Authorization for Client: **KZ Client2**

Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorization Holds	Current Available Balance	Monthly Max	Weekly Max	Daily Max
PCSED	01/01/2024	01/01/2025	10000.00 Units	9928.00 Units	68.00 Units	9860.00 Units	833.00 Units	208.00 Units	30.00 Units

Authorizations

KZ Client2 - T45158 06/18/2024 Search Reset **Display as Units** ← **Authorizations display as time. Click to display as units.**

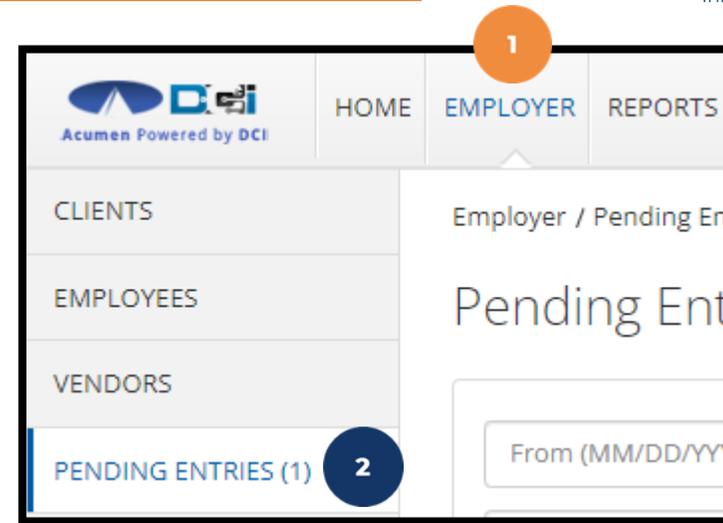
Authorization for Client: **KZ Client2**

Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorization Holds	Current Available Balance	Monthly Max	Weekly Max	Daily Max
PCSED	01/01/2024	01/01/2025	2500 Hours, 0 Minutes	2482 Hours, 0 Minutes	17 Hours, 0 Minutes	2465 Hours, 0 Minutes	208 Hours, 15 Minutes	52 Hours, 0 Minutes	7 Hours, 30 Minutes

1. Initial Balance - Total amount of authorization
2. Remaining Balance - Amount remaining after pre-authorization holds have been processed for billing and payment
3. Pre-Authorization Holds - Amount deducted from the authorization that has not yet been processed for billing and payment
4. Current Available Balance - The total of the remaining balance minus any pre-authorization holds

# Navigate to Pending Entries

1. Click **Employer** on the main menu
2. Select **Pending Entries** on the submenu
  - ✓ The number of pending entries displays in parenthesis on the submenu



All entries requiring review/action appear in the table

Approve	Punch ID	Service Date	Start Time	End Time	Cost Center	Client/ Program Name	Employee/ Program Name	Service Code/Type	Amount	EWV	Needs Review
A R	68312	Dec 19, 2023	01:06 PM	01:10 PM	JVK Cost Center - JVKCostCenter			EVVRequired	0:00:04	No	?
A R	68310	Dec 19, 2023	12:47 PM	12:51 PM	JVK Cost Center - JVKCostCenter			EVVRequired	0:00:04	YES	👁
A R	68306	Dec 19, 2023	11:57 AM	12:46 PM	Kenneth Cost Center - KEN			Hourly	0:00:49	YES	👁
A R	68304	Dec 19, 2023	01:18 PM	01:18 PM	Default Cost Center - 00-000			DPI Hourly	0:00:00	YES	

# Facial Recognition Setup

1. Take a picture of the client (participant). Photos must comply with the requirements below:
  - Participant is the only individual in the photo
  - Participant is facing the camera directly with a full face in view
  - Participant is not wearing sunglasses, hat, or any other accessory that alters the Participant's appearance.
  - Photos are taken with a solid color background
  - Photo size is 2MB or less
  - JPG format
2. Email the picture to Acumen Customer Service at [customerservice@acumen2.net](mailto:customerservice@acumen2.net)
  - **\*Please note! A valid email must be on file for the employer/client (participant) to set up facial recognition. The photo must be sent from the email on file.**
  - Type "Photo - Facial Recognition Setup" in the email subject line
  - Enter the client's name, state, and program (Kansas) in the body of the email
  - Acumen will send notification when setup is complete
    - ✓ Your employee will now be able to use Picture as an EVV option at clock out when using the mobile app



## *How does facial recognition work?*

Facial recognition is the process of identifying or verifying a person's identity by comparing their face to a collection of pictures of them. It "learns" over time and becomes more accurate with each submission. Acumen will collect, but not share photos. Photos are stored in a secure business cloud and are only used by our facial recognition technology to verify that the client was present for the employee's visit.

# Verify Picture

1. If an entry has a red eye icon in the Needs Review column, hover over it to see why it needs review. If it states, "Picture Unverified", click anywhere on the entry row to open the punch details page.
2. Select the Verifications tab
3. Click the double arrows in the Compare column to compare the client's profile picture with the EVV picture taken by the employee during the shift
4. Click the A to approve the picture or the red R to reject it. The punch may now be approved or rejected.

Approve	Punch ID	Service Date	Start Time	End Time	Cost Center	Client/ Program Name	Employee/ Program Name	Service Code/Type	Amount	EVV	Needs Review
A R	68341	Dec 21, 2023	09:28 AM	09:32 AM	Steph Cost Center test - Steph Cost Center test	Steph Client1	Steph Employee1	RESPIRE (Hourly)	0:00:04	- Picture Unverified	

Ref Entries | Notes | Attachments | Events | **Verifications** | Map | Business Rules | Auto Approval | Custom Fields | History

From (MM/DD/YYYY) **2** (MM/DD/YYYY) Verification Type Select Status

Reset Search

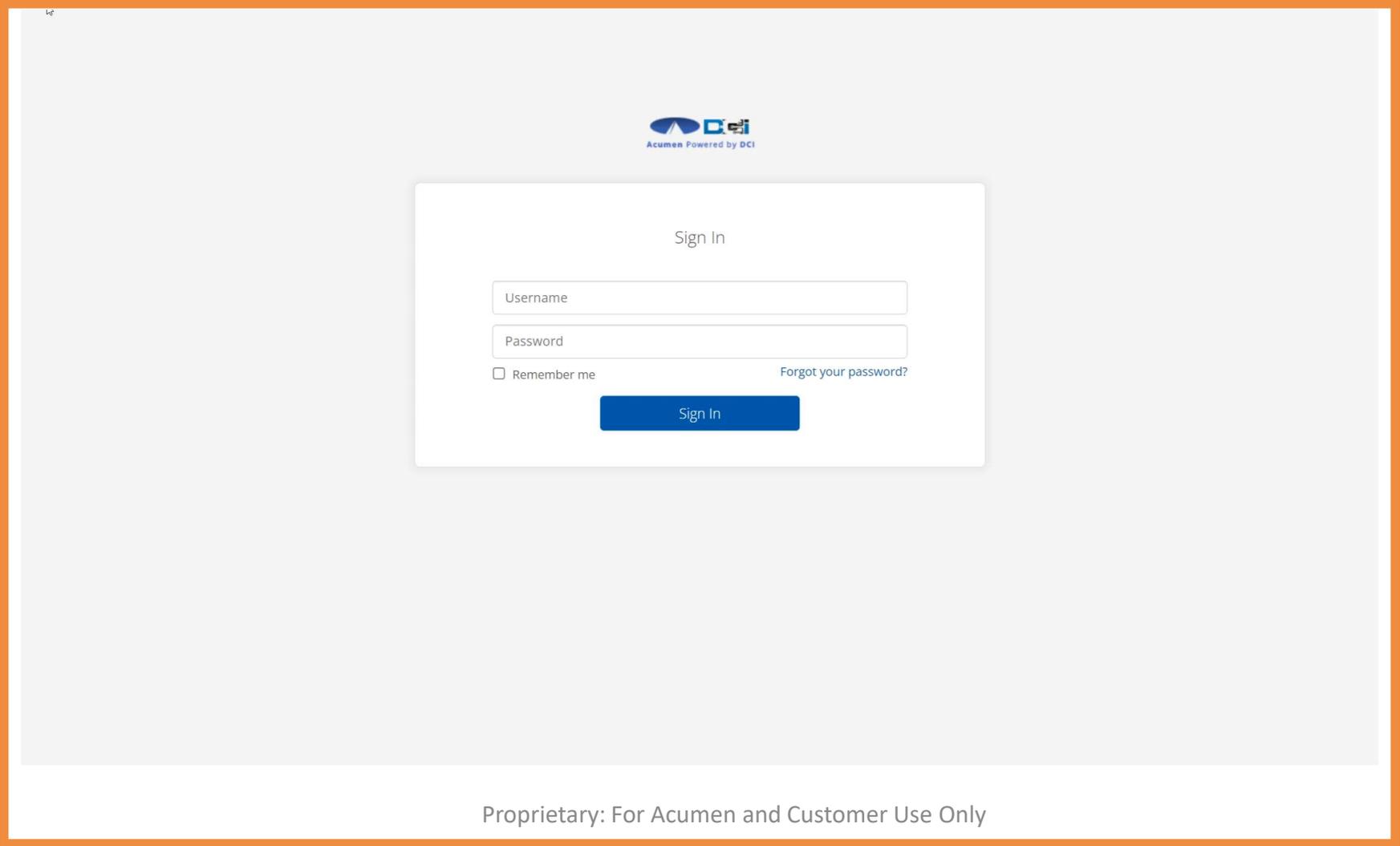
Export

Showing 1 out of 1 record

Approve	Date	Verification Type	Status	Attachments	Compare	Approved By	Approved Date
A R <b>4</b>	Dec 21, 2023 09:31:46 AM	Picture	Unverified	<a href="#">6bde351-0119-483c-b3b2-e31d99223e9d.jpeg</a>	<b>3</b>		

# Employer Web Portal Video

# Verify Picture



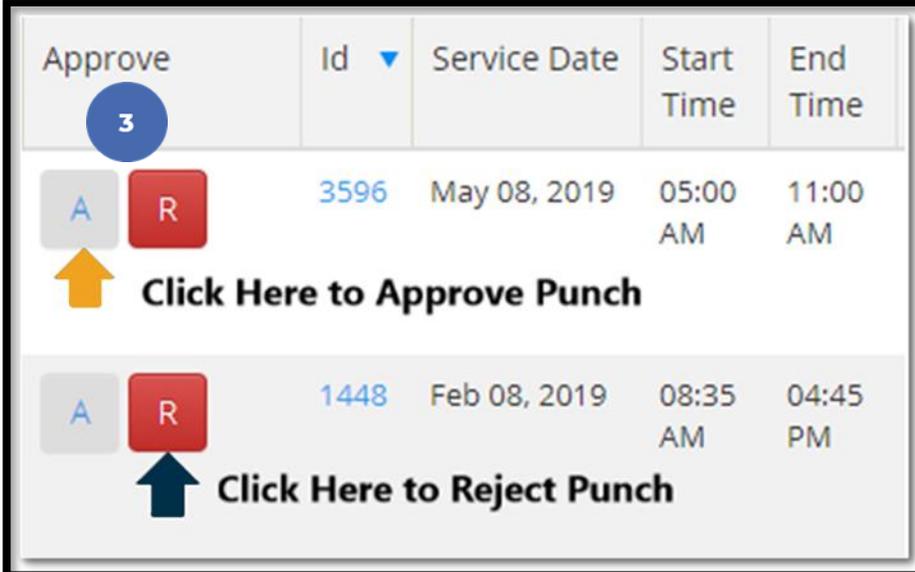
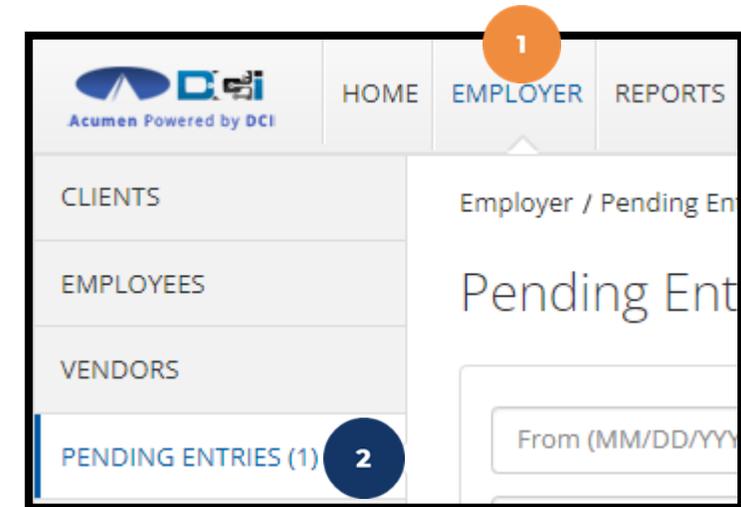
The screenshot shows a web portal sign-in page. At the top center is the Acumen logo with the text "Acumen Powered by DCI". Below the logo is a "Sign In" heading. There are two input fields: "Username" and "Password". Below the "Password" field is a checkbox labeled "Remember me" and a link "Forgot your password?". A blue "Sign In" button is positioned below the input fields. The entire page is framed by an orange border.

Proprietary: For Acumen and Customer Use Only



# Manage Pending Entries

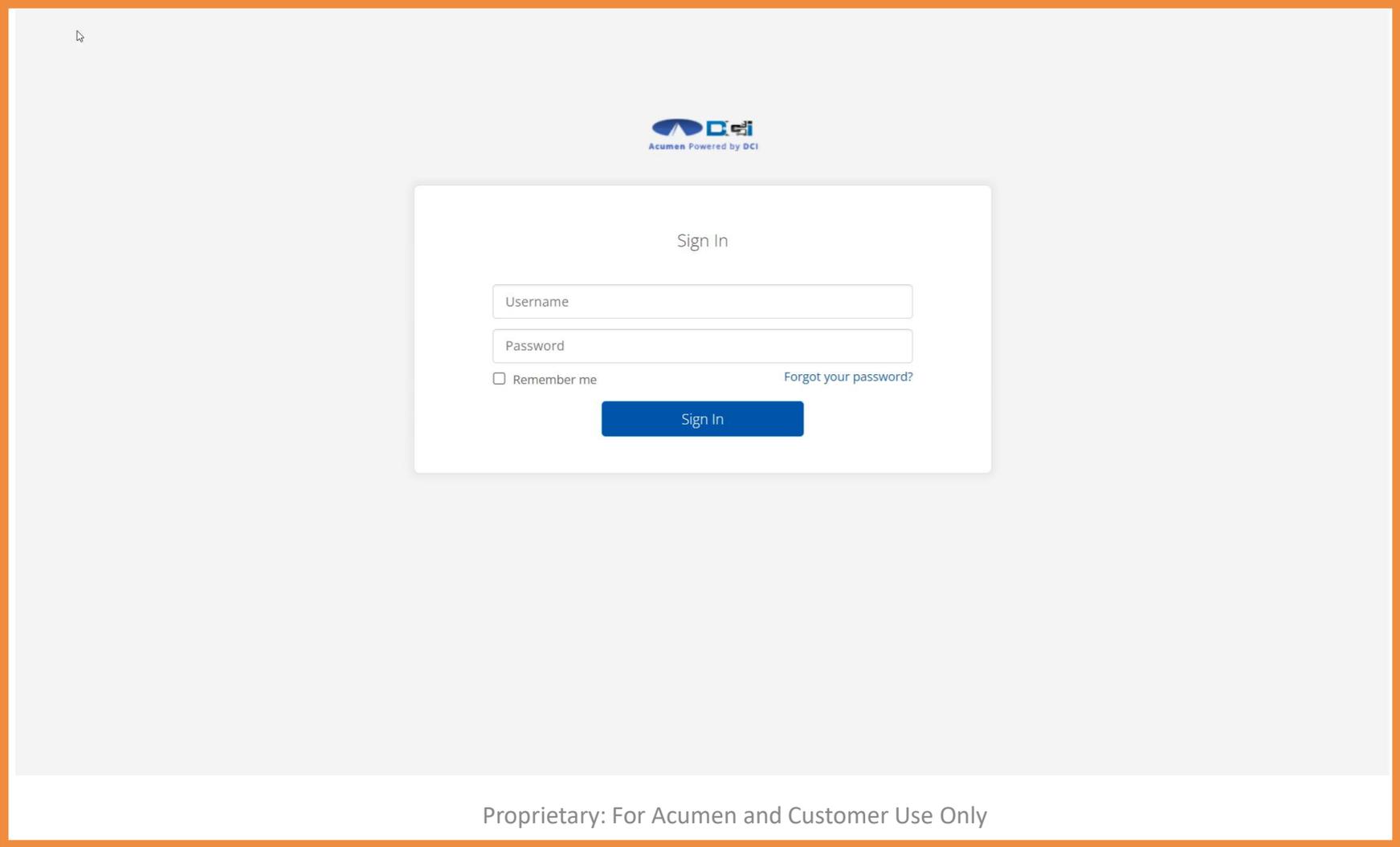
1. Click **Employer** on the main menu
2. Select **Pending Entries** on the submenu
  - ✓ The number of pending entries displays in parenthesis on the submenu
3. Any punch that requires approval is listed here
  - ✓ Review each entry
    - Click on the entry to view all details
  - ✓ Approve or reject
    - Click the **A** on the entry line to approve
      - ❖ Entries must be approved within 5 days of the date of service
      - ❖ After 5 days the approval will be prohibited as it will violate the timely filing business rule
    - Click the red **R** on the entry line to reject
      - ❖ If an entry is rejected, ask the employee to re-enter the time correctly in the DCI web portal.



Approve	Id	Service Date	Start Time	End Time
<b>3</b>	3596	May 08, 2019	05:00 AM	11:00 AM
<b>A</b> <b>R</b>				
<b>Click Here to Approve Punch</b>				
<b>A</b> <b>R</b>	1448	Feb 08, 2019	08:35 AM	04:45 PM
<b>Click Here to Reject Punch</b>				

# Employer Web Portal Video

## Manage Entries



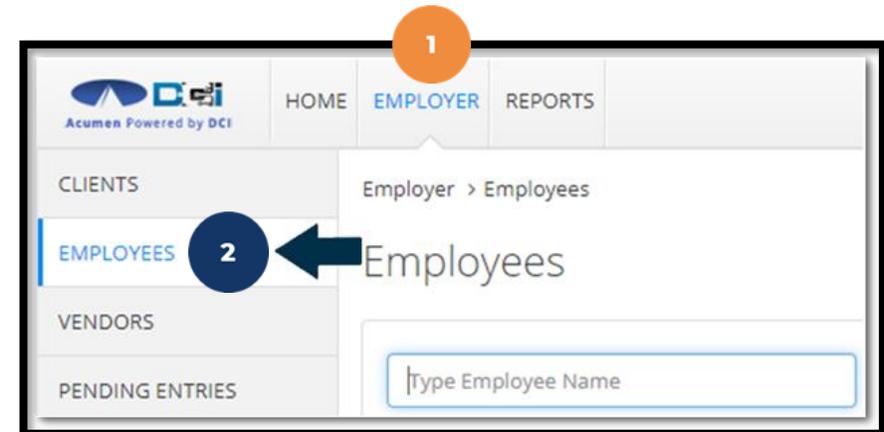
The screenshot shows a web portal sign-in page. At the top center is the Acumen logo with the text "Acumen Powered by DCI". Below the logo is a "Sign In" heading. There are two input fields: "Username" and "Password". Below the "Password" field is a checkbox labeled "Remember me" and a link "Forgot your password?". A blue "Sign In" button is positioned below the input fields. The entire page is enclosed in an orange border.

Proprietary: For Acumen and Customer Use Only



# Using the Employees Page

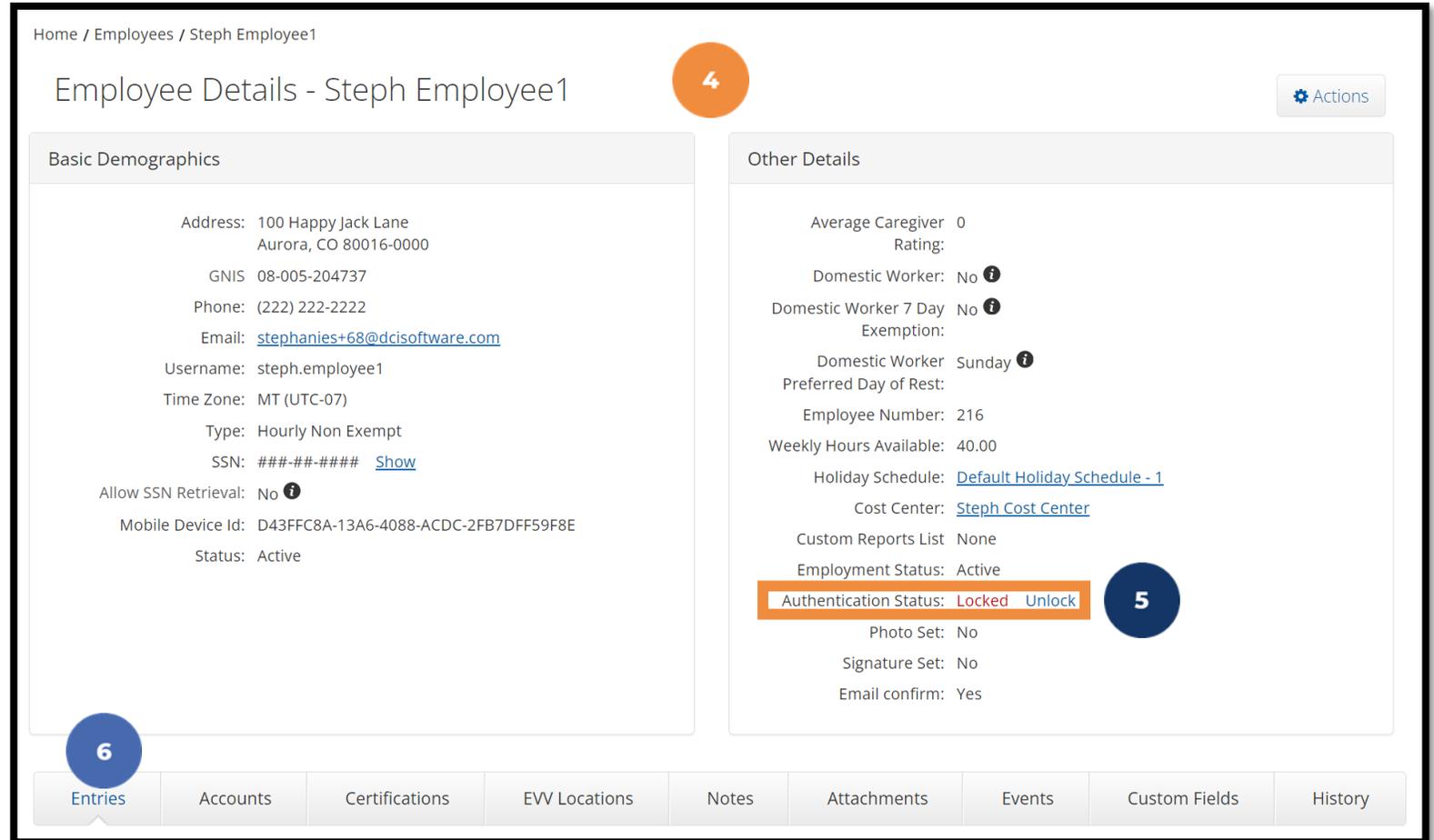
1. Click **Employer** on the main menu
2. Select the **Employees** tab from the submenu
3. Click anywhere on the selected employee's line



Name	Employee #	Phone #	Email	Time Zone	Type	Status
Steph Employee1	721	(222) 222-2222	stephanies+320@dcisoftware.com	MT (UTC-07)	Hourly Non Exempt	Active

# Using the Employees Page (cont.)

4. View the employee details page
5. Unlock Employee Profile if needed
6. Scroll down to the Entries tab



Home / Employees / Steph Employee1

## Employee Details - Steph Employee1

Actions

### Basic Demographics

Address: 100 Happy Jack Lane  
Aurora, CO 80016-0000

GNIS: 08-005-204737

Phone: (222) 222-2222

Email: [stephanies+68@dcisoftware.com](mailto:stephanies+68@dcisoftware.com)

Username: steph.employee1

Time Zone: MT (UTC-07)

Type: Hourly Non Exempt

SSN: ###-##-#### [Show](#)

Allow SSN Retrieval: No ⓘ

Mobile Device Id: D43FFC8A-13A6-4088-ACDC-2FB7DFF59F8E

Status: Active

### Other Details

Average Caregiver Rating: 0

Domestic Worker: No ⓘ

Domestic Worker 7 Day Exemption: No ⓘ

Domestic Worker Preferred Day of Rest: Sunday ⓘ

Employee Number: 216

Weekly Hours Available: 40.00

Holiday Schedule: [Default Holiday Schedule - 1](#)

Cost Center: [Steph Cost Center](#)

Custom Reports List: None

Employment Status: Active

Authentication Status: **Locked** [Unlock](#)

Photo Set: No

Signature Set: No

Email confirm: Yes

6

Entries Accounts Certifications EVW Locations Notes Attachments Events Custom Fields History

# Using the Employees Page (cont.)



7. View the punch entries for the employee
8. Ensure all time for the pay period is entered and approved before the submission due date

Navigation tabs: Entries, Accounts, Certifications, EVV Locations, Notes, Caregiver Ratings, Attachments, Custom Fields, History

Filters:

- From (MM/DD/YYYY) [Calendar icon]
- To (MM/DD/YYYY) [Calendar icon]
- Type Punch Id
- Type Client Name
- Type Service Code
- Select Account Type [Dropdown]
- Select Status [Dropdown]

Buttons: Reset, Search

Entries **7** Export

Showing 13 out of 13 records

Id	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Service Code	Amount	Status
1897873	Jul 12, 2023			Client Transportation	1897872	Steph Cost Center - 75	Steph Client1	Client Transportation	0.00	Approved
1894616	Jun 07, 2023	05:00 AM	08:00 AM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:03:00	Approved
1894612	Jun 04, 2023	04:00 PM	05:00 PM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:01:00	Approved
1894611	Jun 03, 2023	04:00 PM	06:00 PM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:02:00	Approved
1897872	Jul 12, 2023	06:22 AM	06:25 AM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:00:03	Pending
1894620	Jun 23, 2023	07:18 AM	07:19 AM	Hourly		Steph Cost Center - 75	Steph Client1	Hourly Respite	0:00:01	Pending

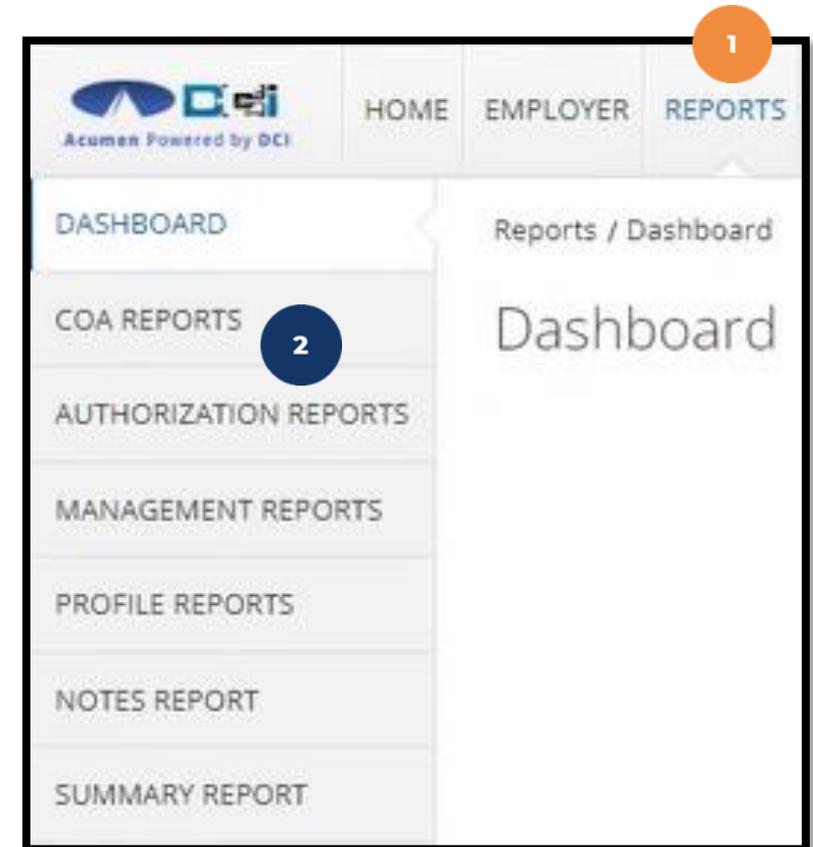
# Entry Status



- **Unverified:** Entries that the Employer or Admin (someone other than the employee) enters or edits on behalf of an employee. The employee must resolve the unverified entries so the employer can review.
- **Unvalidated:** Temporary status. Entries that are waiting for the business rule validation process to complete. This process runs multiple times an hour. Moves to pending or rejected status after processes run.
- **Pending:** Entries that are awaiting review and approval by the Employer. Display on the Pending Entries page.
- **Rejected:** Entries that have been rejected by the Employer or a system process
- **Approved:** Entries that have been approved by the Employer and are ready to be processed
- **Batched:** An approved entry that has been included in a pending payroll batch
- **Processed:** Entries that have been processed and are ready for payroll

# Using Reports

1. Select **Reports** on the main menu
2. Select a report category from the submenu
  - ✓ **COA Reports**
    - Punch Entries Report – Use the filters to locate specific entries
  - ✓ **Authorization (Service Plan) Reports**
    - Authorization Run Rate Report – View the service plan usage breakdown by client, account type, or service code.
  - ✓ **Notes Reports**
    - Punch Entry Notes and Canned Statements (Tasks) Report - Pull service notes and canned statements (tasks) entered on punches
  - ✓ **Summary Report** - Breakdown of punches and percentages of service plan units remaining



# Troubleshooting

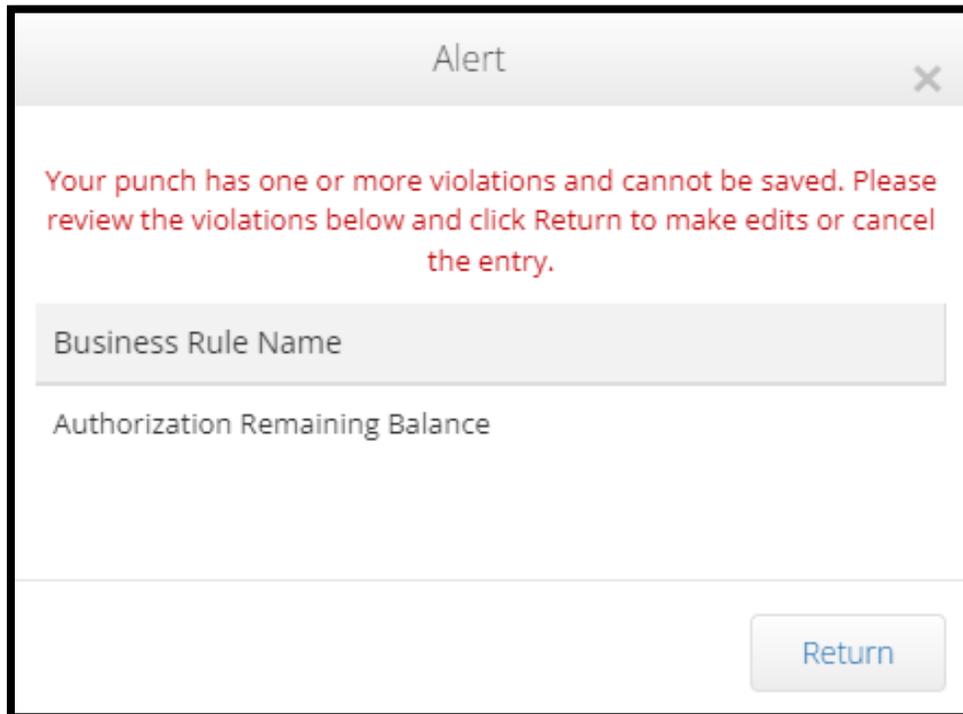
Proprietary: For Acumen and Customer Use Only



# Alerts

Business rules are a tool used by your organization to validate, by service code, specific requirements mandated by that service. When a punch violates a business rule, the employee will receive an alert explaining the violation and what action needs to be taken.

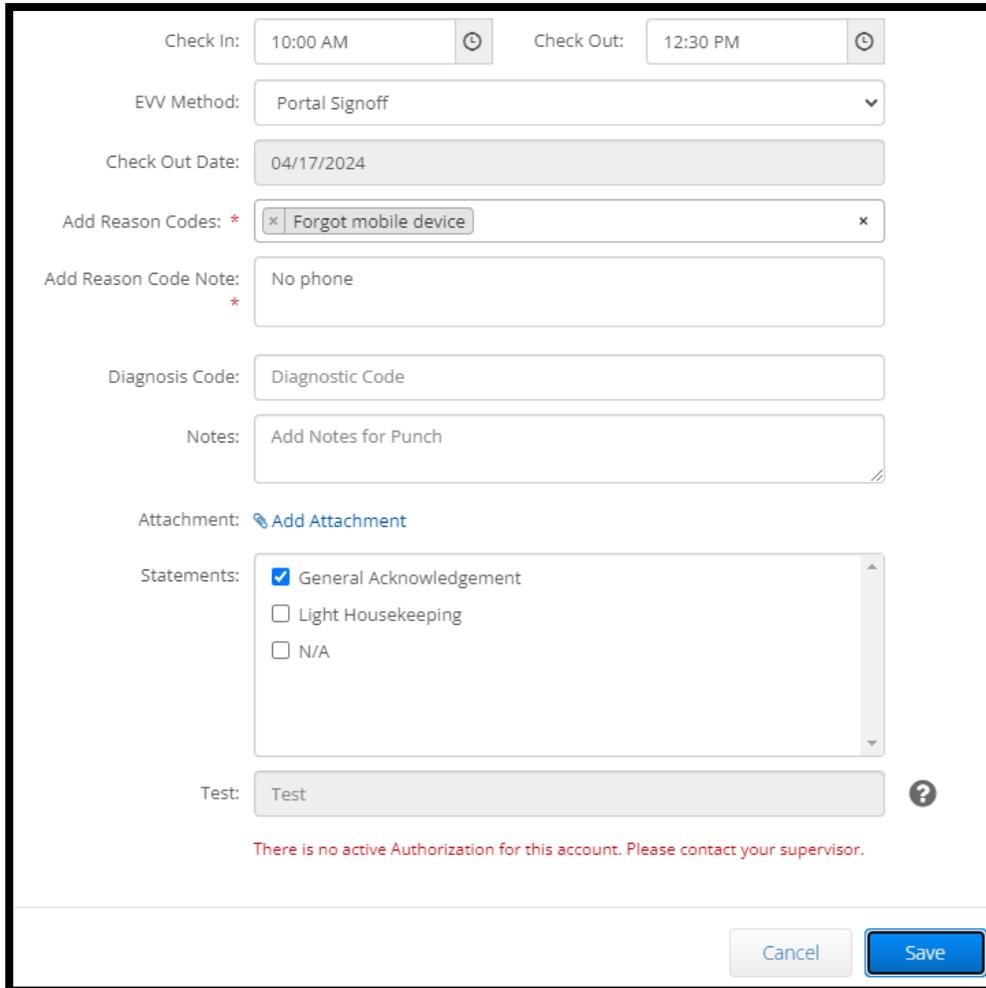
One of the most common business rules is the **Authorization Remaining Balance** rule. This rule checks to see that there are enough funds in the authorization/service plan to cover the punch.



- The employee will receive this alert and cannot save the punch
- They must edit the punch or cancel the entry
- The employer should review their unit utilization

# Alerts

Many other business rules pertain to the authorization/service plan such as the **Authorization Expiration Date** rule.



The screenshot shows a punch authorization form with the following fields and values:

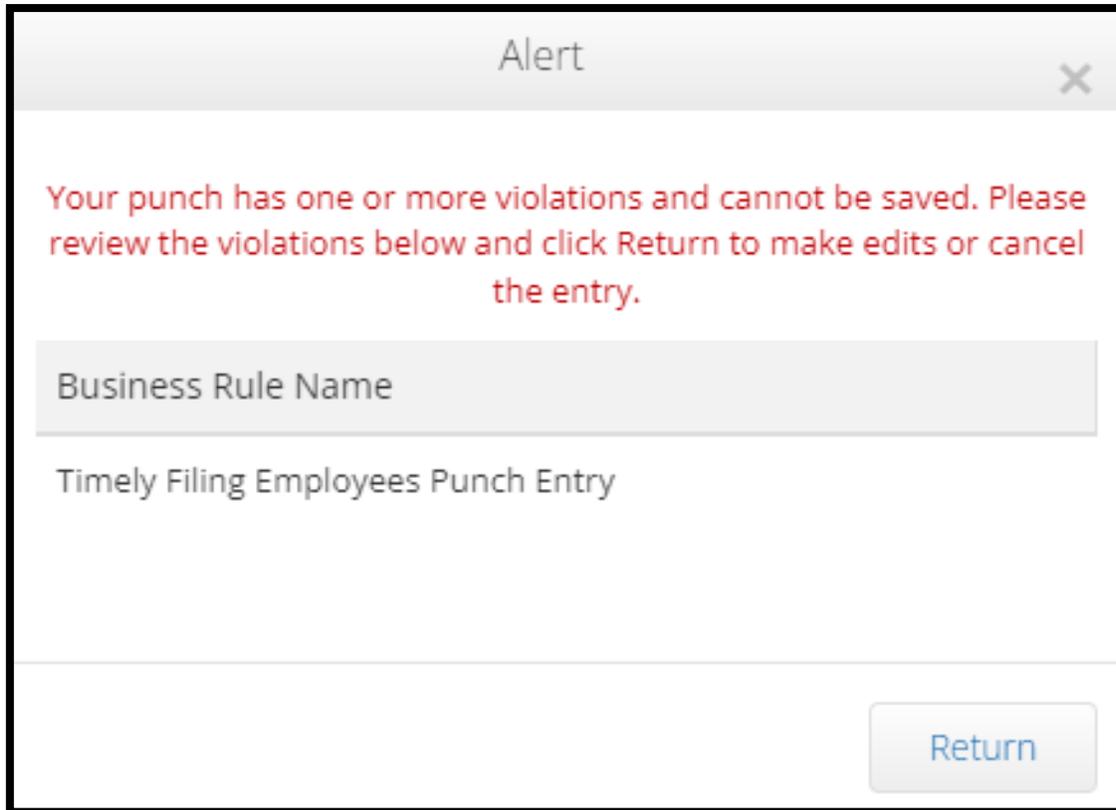
- Check In: 10:00 AM
- Check Out: 12:30 PM
- EVV Method: Portal Signoff
- Check Out Date: 04/17/2024
- Add Reason Codes: \* Forgot mobile device
- Add Reason Code Note: \* No phone
- Diagnosis Code: Diagnostic Code
- Notes: Add Notes for Punch
- Attachment: Add Attachment
- Statements:  General Acknowledgement,  Light Housekeeping,  N/A
- Test: Test

At the bottom of the form, a red error message reads: "There is no active Authorization for this account. Please contact your supervisor." Below the error message are "Cancel" and "Save" buttons.

- The employee will receive this alert when attempting to punch for a date after the authorization/service plan has expired
- They cannot save the punch
- The employee should contact the employer
- The employer should verify their authorization data in DCI

# Alerts

Punches must be **entered AND approved** within 5 days of the date of service. After 5 days the **Timely Filing Employees Punch Entry** or the **Timely Filing Employee Punch Approval** rules will prohibit the punch from being saved.



Alert

Your punch has one or more violations and cannot be saved. Please review the violations below and click Return to make edits or cancel the entry.

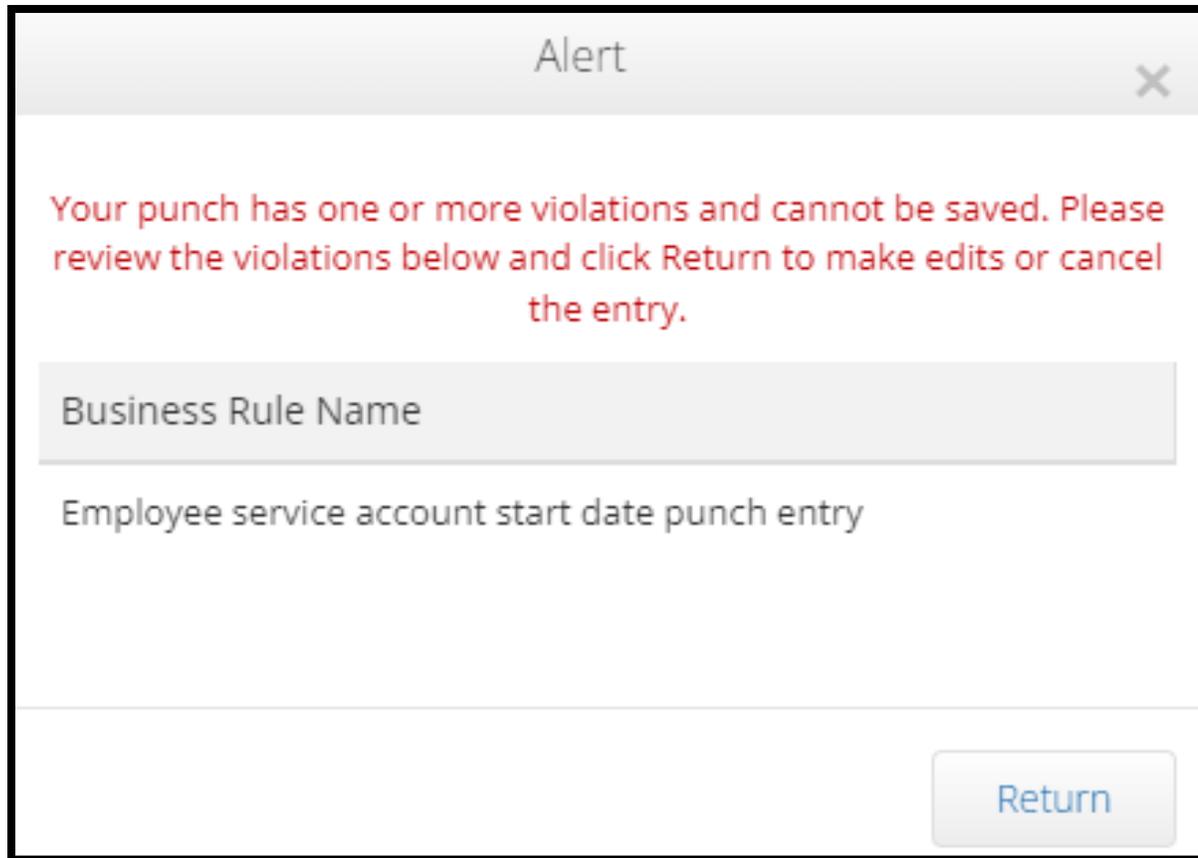
Business Rule Name
Timely Filing Employees Punch Entry

Return

- The employee will receive this alert when attempting to punch for a date that is more than 5 days after the date of service
  - The Timely Filing Employee Punch Approval alert would show if the punch was created within the timeframe, but the employer was attempting to APPROVE the punch more than 5 days after the date of service.
- The employee cannot save the punch
  - Or, in the case of the Timely Filing Employee Punch Approval alert, the employer would be unable to approve the punch.
- No action can be taken

# Alerts

Punches may only be entered for an active service account. If the employee attempts to enter a punch before the start date or after the end date of the service account, they cannot save the punch. This triggers either the **Employee Service Account Start Date Punch Entry** rule or the **Employee Service Account End Date Punch Entry** rule.

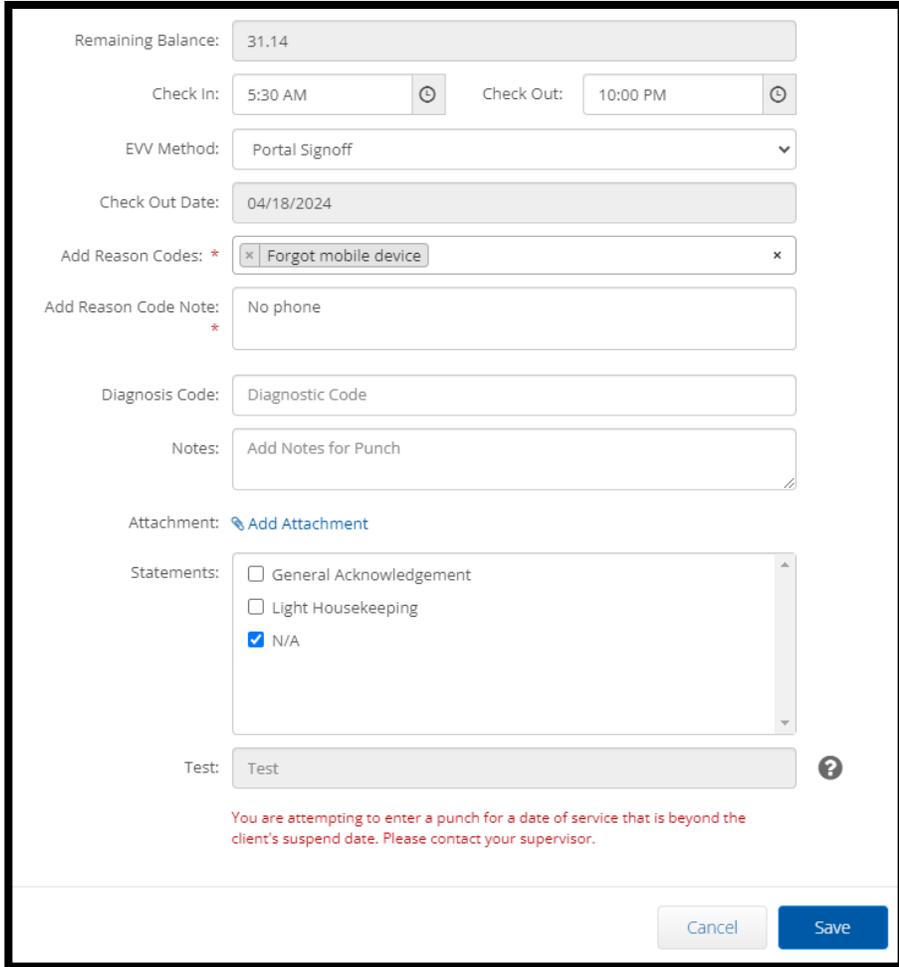


The screenshot shows a dialog box titled "Alert" with a close button (X) in the top right corner. The main text inside the dialog is: "Your punch has one or more violations and cannot be saved. Please review the violations below and click Return to make edits or cancel the entry." Below this text is a list of violations, with the first one being "Business Rule Name" and the second one being "Employee service account start date punch entry". At the bottom right of the dialog is a button labeled "Return".

- The employee cannot save the punch
- Ensure the correct dates have been entered for the punch
- The employee should contact the employer

# Alerts

If enrollment is on hold, or the client cannot receive service, the client profile will be suspended. Punch entries cannot be added after the suspension date.



The screenshot shows a punch entry form with the following fields and values:

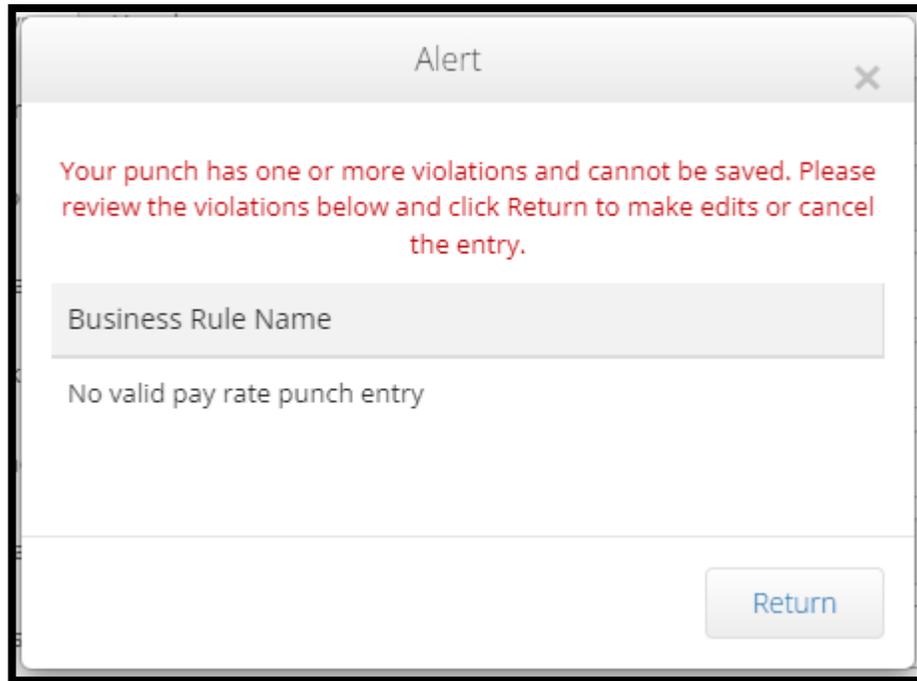
- Remaining Balance: 31.14
- Check In: 5:30 AM
- Check Out: 10:00 PM
- EW Method: Portal Signoff
- Check Out Date: 04/18/2024
- Add Reason Codes: \* Forgot mobile device
- Add Reason Code Note: \* No phone
- Diagnosis Code: Diagnostic Code
- Notes: Add Notes for Punch
- Attachment: Add Attachment
- Statements:  General Acknowledgement,  Light Housekeeping,  N/A
- Test: Test

A red error message at the bottom of the form reads: "You are attempting to enter a punch for a date of service that is beyond the client's suspend date. Please contact your supervisor." The "Save" button is disabled.

- The employee cannot save the punch
  - While the system allows the employee to log in on the mobile app, they cannot clock out, so the punch is not saved.
- Ensure the correct dates have been entered for the punch
- The employee should contact the employer

# Alerts

If enrollment was on hold, or the client couldn't receive service for a period of time, the employee would have no valid pay rate for that date range. The date of service the employee is attempting to enter a punch entry for has no valid pay rate.



- The employee cannot save the punch
  - While the system allows the employee to clock in on the mobile app, they cannot clock out, so the punch is not saved.
- Ensure the correct dates have been entered for the punch
- The employee should contact the employer

# Alerts

If the punch causes the authorization remaining balance to drop below 75% of the initial balance, an alert displays at the time of approval. It does not stop the punch from being approved.

Alert ✕

Are you sure you want to approve the punch for **0:23:00** hour(s) for **Steph Employee3** for **Steph Client3-7726** for **Aug 25, 2024**? By clicking Yes, you are confirming you have reviewed this punch and all required elements.

Business Rule Name	Message
Authorization Remaining Balance Threshold Alert	<b>Warning: Authorization remaining balance has dropped below 75% of the initial balance</b>

# Check Entries

If a punch entry violates the **Authorization Weekly Max** business rule, it can be saved, but is later rejected when the business rule runs. The employee does not receive an alert but can see that the punch was rejected and that the business rule failed.

Entries Export

Showing 30 out of 380 records

Id	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Service Code	Amount	Status
<a href="#">39492</a>	Apr 14, 2024	12:00 AM	11:30 PM	Hourly		Steph Cost Center test - Steph Cost Center test	<a href="#">Steph Client1</a>	RESPIRE (Hourly)	0:23:30	Rejected
<a href="#">39491</a>	Apr 15, 2024	12:00 AM	11:30 PM	Hourly		Steph Cost Center test - Steph Cost Center test	<a href="#">Steph Client1</a>	RESPIRE (Hourly)	0:23:30	Rejected

Ref Entries | Notes | Attachments | Verifications | Map | **Business Rules** | Auto Approval | Custom Fields | History

Business Rules

Business Rule Name	Business Rule Result
Employee service account start date punch entry	Pass
<b>Authorization Weekly Max</b>	<b>Fail</b>
Max Hours Per Week Per Client Per Funding Source	Pass
Authorization Expiration Date	Pass

1. The employee should always review their entries and check the status
2. Click on the **punch row** to review the punch details
3. Click the **Business Rules tab** to view the result

The employee should contact the employer

# **Phone IVR (Interactive Voice Response)**

**\*Option when access to a mobile device  
or computer is limited**

# Phone EVV Basics

- Employer - Confirm the landline phone number on file with Acumen is for the client
  - ✓ Employees must call from a recognized number only
  - \***Please note!** If calling from a number not associated with the client, the employee will receive an error message.
- Employee - Will be asked to validate the following information:
  - ✓ Last four digits of their social security number
  - ✓ PIN (their employee pin)
  - ✓ MMDD of their birthday
  - ✓ Client Name & Service Code for the shift
- Client or Employer – Need client PIN for historical (non-EVV-compliant) phone entries
  - ✓ Client PIN will be issued in the email or letter sent by Helpers by September 24<sup>th</sup>



# Clock In: Real Time Entry

1. Sign in:
  - ✓ Call (855) 807-9595 from the client's landline to start the shift
  - ✓ Enter the last four digits of the social security number
  - ✓ Enter PIN
  - ✓ Enter month/day of birth (MMDD)
2. Press #1 for hourly
3. Confirm the client's name with the prompt given
4. Press #1 for real time entry
5. Select the service code with the prompts given
6. Select the clock in EVV location
  - ✓ If the user is calling from the associated EVV phone number, this step will not occur. The EVV location will be automatically selected.
7. Press #1 to confirm and save the punch
8. The recording will read back the punch details and then disconnect



# Clock Out: Real Time Entry



1. Sign in:
  - ✓ Call (855) 807-9595 from the client's landline to end the shift
  - ✓ Enter the last four digits of the social security number
  - ✓ Enter PIN
  - ✓ Enter month/day of birth (MMDD)
2. Recording announces that there is an open punch
3. When prompted press #1 to confirm closing the punch
4. Select the clock out EVV location
  - ✓ If the user is calling from the associated EVV phone number, this step will not occur.  
The EVV location will be automatically selected.
5. The system will read each task/statement. **Select 1** if the task was completed or **2** if the task was not completed (e.g., Personal hygiene, press 1 for yes and 2 for no). Select at least one statement/task or the call will disconnect, and the process must be restarted.
6. The punch is now closed and the employee is clocked out
7. Press #2 to disconnect or Press #1 to open a new punch



# Historical Entry

**\*Please note!** Historical entries are only used for a missed punch or punch correction due to service interruption. The goal should always be to enter punches in real time to maintain EVV compliance.

*The client or employer must be present at the end of this process.*

1. Sign in:
  - ✓ Call (855) 807-9595 from the client's landline to enter the shift
  - ✓ Enter the last four digits of the social security number
  - ✓ Enter PIN
  - ✓ Enter month/day of birth (MMDD)
2. Press #1 for hourly
3. Confirm the client's name with the prompt given
4. Select #2 for historical entry
5. Select the service code with the prompts given



# Historical Entry (cont.)

6. Enter the date of service in MMDDYYYY format (i.e., April 28, 2024 = 04282024)
7. Enter the clock-in time in HH:MM (i.e., 0830)
8. Select #1 for AM or #2 for PM
9. Enter the clock-out time in HH:MM (i.e., 0530)
10. Select #1 for AM or #2 for PM
11. Select the clock in EVV location
  - ✓ If the user is calling from the associated EVV phone number, this step will not occur. The EVV location will be automatically selected.
12. Select the clock out EVV location
  - ✓ If the user is calling from the associated EVV phone number, this step will not occur. The EVV location will be automatically selected.
13. The system will read each task/statement. **Select 1** if the task was completed or **2** if the task was not completed (e.g., Personal hygiene, press 1 for yes and 2 for no). Select at least one statement/task or the call will disconnect, and the process must be restarted.
14. The recording will read back the punch details
15. Press #1 to confirm



# Historical Entry (cont.)

---

**\*Please Note!** The client or employer must be present for the following final steps:

14. Hand the phone to the client/employer who presses #1 when ready
15. The client/employer reviews the punch details and presses #1 to accept or #2 to reject the entry
16. The client/employer will validate the call using the client PIN
17. The punch is created
18. The phone disconnects and the shift is recorded



# Troubleshooting

- Is the employee having trouble signing in?
  - ✓ PIN not working? Update under profile settings
  - ✓ Employee can call Acumen to confirm their date of birth & last four digits of their social security number on their profile
- Is the employee having trouble clocking in?
  - ✓ Only call from the client's landline
    - Call Acumen at (866) 321-0114 to confirm the client's number
- Is the employee having trouble adding historical entries?
  - ✓ Enter the date & time in the correct format (MM/DD/YYYY & HH:MM)
  - ✓ Do not overlap with other employee's shifts
- Is the client having trouble validating the entry?
  - ✓ Employer calls Acumen to reset their client PIN



# Payroll Schedule & Deadlines

Proprietary: For Acumen and Customer Use Only



# Important Update!

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- AuthentiCare will no longer be utilized after September 30<sup>th</sup>, 2024. Please begin using DCI October 1<sup>st</sup>, 2024, for all time entry.
  - ✓ Email / Mailing sent by Helpers on September 10<sup>th</sup>, 2024, announced that beginning October 1<sup>st</sup>, 2024, the organization will use a new electronic timekeeping system, Direct Care Innovations (DCI), offered through our management company, Acumen.
    - DCI works as both the Electronic Visit Verification (EVV) and time entry system
- Employees are responsible for all time entries including new and edited entries
  - ✓ Notices about missed punches will no longer be provided
  - ✓ Time adjustments via voicemail or email will no longer be accepted
  - ❖ Entries must be approved within 5 days of the date of service
    - After 5 days the approval will be prohibited as it will violate the timely filing business rule
- Employers are responsible for reviewing and approving all time
  - ❖ Entries must be approved within 5 days of the date of service
    - After 5 days the approval will be prohibited as it will violate the timely filing business rule

# Helpers Payment Schedule



- Time must be approved by the due date
- Pay dates remain the 3<sup>rd</sup> & the 18<sup>th</sup>
- First paycheck from Helpers will be November 1<sup>st</sup>, 2024, since the 3<sup>rd</sup> falls on a weekend.

Dates Worked:	Approval Due Date:	Pay Date (effective 8/1):
1 <sup>st</sup> – 15 <sup>th</sup>	20 <sup>th</sup> of the Month	3 <sup>rd</sup> of the following Month
16 <sup>th</sup> – 31 <sup>st</sup>	5 <sup>th</sup> of the Month	18 <sup>th</sup> of the following Month

# Where to go for help?

- Utilize our DCI Training Materials for more help

- This will give you a full list of Training Materials for DCI



**Helpers – (913) 322-7212**

**Tollfree - (866) 321-0114**

<https://www.helpersinc.org/>



**OR link to the Helpers site through:**

<https://www.acumenfiscalagent.com/state/kansas/>

**Info@helpersinc.org** – Client related questions (service plans, auths, etc.)

**Work@helpersinc.org** – Worker related questions (application status, etc.)

**Help@helpersinc.org** – DCI related questions

**Payroll@helpersinc.org** – Pay related questions (direct deposit, VOE, etc.)

For payment or other questions, please complete the Contact Us form at [www.acumenfiscalagent.com/contact](http://www.acumenfiscalagent.com/contact) or email us at [payroll@helpersinc.org](mailto:payroll@helpersinc.org).



**Acumen powered by DCI**

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**Questions?**

**Thank you!**

**Visit the Acumen Help Center  
to learn more at:**

**[acumenfiscalagent.zendesk.com](https://acumenfiscalagent.zendesk.com)**